

1980

# Midmanagement and entry level fashion merchandising competencies

Kathleen Greenley Beery  
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MIDMANAGEMENT AND ENTRY LEVEL FASHION MERCHANDISING  
COMPETENCIES

*Iowa State University*

PH.D.

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**Midmanagement and entry level fashion  
merchandising competencies**

**by**

**Kathleen Greenley Beery**

**A Dissertation Submitted to the  
Graduate Faculty in Partial Fulfillment of the  
Requirements for the Degree of  
DOCTOR OF PHILOSOPHY**

**Major: Home Economics Education**

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**1980**

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## INTRODUCTION

During the past 20 years the public has been increasingly demanding accountability from public education in terms of financial management and educational goals. The demand has been evidenced by many occurrences. With the steady increase in the burden of local, state, and federal taxes beginning in the late sixties, citizens began to question the value bought with their tax dollars. The one type of tax where an individual had a chance to exert direct influence on spending was in public school financing. Rejection of school bond issues was interpreted by many as a rejection of the work of the schools. In many states, lawsuits were filed because children could not read or write.

The federal government began to increase funds intended for educational research and development in the sixties. More emphasis was being placed on accountability and the end results of educational programs. The question was being asked, "Can the student function in life roles?"

In vocational education an additional impetus to improve accountability of programs was included in the Vocational Amendments of 1976 (U.S. Congress, 1976). Under this legislation, each state is required during a five-year planning period to evaluate the effectiveness of every program being supported by funds under the new amendments. Other evalua-

tions must be conducted to determine the degree of employment of graduates and the extent to which employees consider the graduates to be well-trained and prepared for employment. In order to support statements of accountability, effective evaluation plans and procedures are needed.

Accountability and evaluation are not synonymous; these terms are both related to results of educational programs, but accountability is the broader concept. The process of program evaluation represents an important means for establishing the accountability of a program. Norton (1972) distinguished five components which should be included in a vocational-technical education evaluation process to improve accountability: needs assessment, evaluation of process, evaluation of product, cost effectiveness, and community and staff involvement.

Product evaluation is a means to determine whether the program actually makes a difference in terms of student outcomes. But there are problems with this type of evaluation because adequate performance criteria have not been developed for many occupational areas. In order to establish the criteria, performance objectives need to be explicitly stated and in many cases this step has not been carried out (Norton, 1972). One basis for developing performance objectives which are explicit and realistic in the world of work is to use competency statements derived from a study of the occupation



or the role involved.

A basis for establishing needed competencies is to build on tasks performed in the particular occupation. Task analysis and competency identification studies have been conducted in the retailing and merchandising occupations.

Carmichael (1968) derived a list of common and identifiable activities of retail middle managers in traditional department, discount, chain department, and variety stores. Each of the functional areas of work as identified by Carmichael was broken down into very explicit statements of tasks. The findings provided a basis on which to build competency statements in the areas of: selling; sales promotion; buying; operations; market research; and managerial skills in planning, directing, coordinating, and controlling.

Crawford (1967) identified the tasks performed and competencies needed by assistant buyers and buyers in department stores. Her study provided general guidelines in terms of functional areas of responsibilities in retailing. But there were several limitations of the study. All statements were presented in terms of a knowledge, skill, or attitude; tasks were not expressed in terms of higher levels of performance such as analyzing, evaluating, or synthesizing. Also the sample size was very small, limiting the extent to which findings can be generalized to a larger population.

LaSalle (1973) identified a set of competencies for mid-

managers in retailing. Competencies were very closely tied to subject matter areas within the postsecondary retail curriculum. The competency statements were broader in scope and provided information about which functional areas were considered important by managers in retail.

These three studies by Carmichael (1968), Crawford (1967), and LaSalle (1973) dealt with skills and competencies needed in retailing. Similar studies in fashion merchandising are not as numerous. Greenwood (1972) conducted an evaluation of a fashion merchandising program in which she examined responsibilities and competencies in fashion merchandising. Her study provided insights into the differences in responsibilities between assistant buyers and buyers, but did not provide an overall view of competencies needed in fashion merchandising.

There are many gaps in the understanding of what skills, knowledges, and attitudes are needed by managers in fashion merchandising. Task studies provide information on specific activities within a job and on the frequency of performance of these activities. Competency studies carry this process one more step; findings indicate what skills, knowledge and attitudes a person needs to possess in order to accomplish these tasks. Many and varied learning experiences precede the successful completion of any task.

Another gap in the understanding of needs of fashion

merchandising managers is in terms of the specific competencies needed which relate to textiles and clothing subject matter. Greenwood (1972) and Cole (1974) identified some of the tasks and competencies needed which pertained to textiles and clothing, but neither study validated a composite set of competencies.

### Goals

The purposes of this research are: 1) to identify a comprehensive list of competencies needed by entry and midmanagement level personnel in fashion merchandising as perceived by business personnel and postsecondary educators and 2) to identify similarities and discrepancies in response by business personnel and educators. The findings on importance of competencies and comparisons between groups will provide implications for the development of curriculum and evaluation materials. This research is part of a larger project, "Standards for postsecondary textiles and clothing programs," funded by the U.S. Office of Education (Note 1).

### Terms

Terms used in this study are defined as follows:

Independent department store: "A department store is defined by the Bureau of the Census as one that employs 25 or more people and sells general lines of merchandise in each

of three categories: home furnishings, household linens and dry goods, and apparel and accessories for the whole family" (Troxell, 1976, p. 164).

Specialty shop: A specialty shop is a type of limited line store which aims at a carefully defined market segment by offering a unique product assortment in shopping goods (McCarthy, 1978).

Chain department store: A chain department store is defined in an identical manner to an independent department store except for conditions of ownership and control. National chain department stores, such as Penneys and Sears Roebuck, are centrally owned and handle merchandise from central or regional locations.

Competency: "An attitude, behavior, skill, or understanding demonstrated by a participant at a specific performance level. A competency is broad in scope" (A.H.E.A., 1974, p. 4).

The Iowa State University Committee on the Use of Human Subjects in Research reviewed this project and concluded that the rights and welfare of the human subjects were adequately protected, that risks were outweighed by the potential benefits and expected value of the knowledge sought, that confidentiality of data was assured and that informed consent was obtained by appropriate procedures.

## REVIEW OF LITERATURE

This chapter begins with an overview and definition of competency-based education. A review of different sources for identifying professional competencies is presented followed by a discussion of methods for deriving competencies in vocational education. The final section is a discussion of task and competency studies in merchandising and retailing.

### Overview and Definition of Competency-Based Education

The terms "competencies," "competency-based education" (CBE), "competency-based professional education" (CBPE), and "performance-based education" are not new terms. From a historical perspective the term competency was in use in the 1950s. Lucien Kinney (Note 2), working with the California Council on teacher education, used the term in his 1952 study "Measure of a Good Teacher." Walsh (1958) conducted a study to determine competencies needed by trade and industrial teachers. Even though the terminology has been in existence since the 50s, the definitions of competency and competency-based education are varied and not widely agreed upon.

### Definition of competency

Competencies are defined in many different terms and at different levels. A publication by the American Home Economics Association (1974, p. 4) defined competency as "an atti-

tude, behavior, skill, or understanding demonstrated by a participant at a specified performance level. A competency is broad in scope."

Kohlmann (1975, p. 20) defined teaching competency as, "a demonstrated ability to promote desirable learning (product) or an exhibited behavior known to promote learning (knowledge and performance)." Kohlmann also indicated that competency statements should incorporate a wide range of behaviors: cognitive, psychomotor, and affective. Greenwood (1972, p. 13) defined competency as "the kind of ability or quality requisite to performance."

Ainsworth (1977) equated competencies with "terminal objectives." Competencies are stated in the same form as objectives but are the end behavior in a sequence of behaviors organized hierarchically. Kohlmann (1975) viewed competencies as similar to intermediate-level or curriculum-level objectives.

#### Definition of competency-based education

Competency-based education has been defined in many ways and is perceived differently by educators and the public. Ainsworth (1977, p. 321) defined it as "an instructional system where students are given credit for performing to a pre-specified level of competency under prespecified conditions." Competency-based education is a nonnormative system where a

student's performance and ability are determined independently of other students in the institution.

Elam (1971, pp. 6-11) suggested a definition consisting of three levels of descriptors: 1) essential elements, 2) implied characteristics, and 3) related or desirable characteristics. Part of the essential elements are the competencies which are knowledge, skills, and behaviors to be demonstrated by students. Criteria in assessing competencies are based upon the competencies. Performance is the primary source of evidence in assessment. A major concern throughout the program is the student's level of progress, not time or course completion. Both competencies and criteria of successful performance are made public in advance.

Elam (1971) stated that one of the implied characteristics of CBE was that instruction is individualized, personalized, and modularized. Learning experience is guided by feedback with the emphasis on exit, not entrance, requirements. The student is held accountable for performance and completes the program when s/he demonstrates the competencies.

The related and desirable characteristics presented by Elam are varied. The program should be field centered, meaning there should be a heavy emphasis on field-oriented experiences. Decisions in program development are based on input from college faculty, students, and public school personnel. The teachers and students cooperatively design the

instructional system. The program is open and regenerative and includes a research component.

Ainsworth (1977) stated that under a competency-based system, a student can attain the competencies via a variety of pathways, formal coursework being only one, and the student works in an independent time frame. Future performance requirements are the common thread throughout the program. This focus on performance requirements permits curricular content to be derived in a systematic fashion.

Spady (1977, p. 10) defined CBE as:

. . . a data-based, adaptive, performance oriented set of integrated processes that facilitate, measure, record, and certify within the context of flexible time parameters the demonstration of known, explicitly stated, and agreed upon learning outcomes that reflect successful functioning in life roles.

This approach emphasizes successful performance in life-role activities as opposed to cognitive, manual, and social capacities like reading and computational skills. The capacities serve as "building blocks" or "enablers" upon which competencies can be built. Spady also described another form of capacity: the sensitivity, awareness, and appreciation of beauty which may serve as "enrichers" of experiences in roles.

There are many definitions and operational descriptions of competency-based education as exemplified by the aforesaid authors. Competency-based programs are unique and vary from one to another. But the common threads appear to be the



individualized, personalized approach and the focus on performance behaviors based on life-roles or occupational roles.

After deciding on the definition of competency and competency-based education, the educator needs to identify the competencies. Ainsworth (1977, p. 326) stated that, "a competency-based system is supposed to allow for the derivation of competencies based upon a systematic analysis of the performance requirements of a particular skill or discipline." For many life roles or occupational roles it is difficult to separate the activities into the component behaviors. The question naturally arises as to what are the sources or approaches for competency identification. Educators and researchers have identified sources for professional competency identification (Ainsworth, 1977; Dodi, 1973; Elam, 1971; Hall & Jones, 1976; Kohlmann, 1975; Spady, 1977; Solomon, Note 3). In the literature pertaining to professional competency identification, "professional competencies" means "teacher competencies."

#### Sources for Professional Competency Identification

Competencies can be derived from various sources: 1) role/task analysis, 2) theoretical model/concept analysis, 3) needs assessment, 4) course translations, and 5) professional/expert judgment. One of these sources might be used exclusively but as Hall and Jones (1976) indicated, a multi-

source identification process probably yields the best results. Following is a brief description of each source.

### Role/task analysis

This procedure involves a functional description of roles performed in the job situation. A description of the roles can be obtained through observational data of practitioners, self-reporting of job tasks, and future-oriented conceptualization of new roles. The tasks vary with schools according to specialization among teachers and the philosophical base of education. Within schools the derived competencies tend to be job-specific due to differentiated responsibilities. But as analysis of roles is repeated across teachers of various types and levels, generic competencies which fit all roles should emerge.

However, the task analysis is most effective when a researcher is reviewing the job of a technician. Joyce and Weil (1972, p. 15) noted that:

To build a training program for a functionary whose job is not very complex, one can frequently arrive at the specifications of the job and hence at the performances required of the functionary by doing a task analysis of what is required to get the job done.

In viewing the tasks of a professional, Joyce and Weil postulated that what separates technicians and skilled professionals is that the professional is a careful and successful applier of theory--knowing "why" and "when" in addition to "how."

### Theoretical model analysis

Competencies can be derived on the basis of theoretical models of instruction. With this method a theoretical position is assumed by program builders and competencies can then be specified from the theory. The competencies selected often can be logically derived from those behavioral tasks required to carry out the operations theoretically required by a model for instructional behavior.

Staff members of various educational institutions have used this procedure to identify competencies. Faculty at Michigan State (Hall & Jones, 1976) developed assumptions and competencies for a model teacher education program that would be characteristic of teachers who were clinical behavioral scientists. Teacher educators at the University of Houston used the definition of a "rational decision-maker" and a "student of human behavior" to identify competencies (Hall & Jones, 1976).

### Needs assessment

This procedure involves determination of the needs of a target audience. The investigator typically works directly with the teacher, students, and community in establishing goals and pupil programs. This system is based on the notion that the relevancy of education must be empirically tested and should establish the gap between "what is" and "what

should be." In the needs assessment, competencies needed by pupils and teachers should be examined.

This approach was used by model developers at the University of Georgia (Johnson, 1969). Their first task was to project over the next decade the needs of society and its individuals. The investigation was concerned with the economy, technology, political theory, and values of society. On the basis of the identified societal needs they projected the type of elementary school that would be most effective in fulfilling its role toward meeting societal needs. After establishing the needs of society and its individuals and the type of elementary school which tends to fulfill these needs, the developers were able to specify the criteria for selecting the various components of the model program.

#### Course translations

In a course translation, instructors, using present course content and objectives, develop competency statements. Practical circumstances such as credit and certification requirements or massive resistance to change may dictate a course translation approach. This method has many desirable consequences: overlaps among courses are identified; the process encourages scrutiny of the existing program by colleagues and many others; and the strengths and weaknesses of a program can be examined.

### Professional/expert judgment

Another method is to use input from members of the particular profession. For example, program planners should ask teachers and administrators what to include for inservice educational programs. Input for a professional program might include: 1) competencies that practitioners indicate are desirable when beginning professional experiences, 2) information on needs of practicing professionals on a current basis, and 3) projections for future needs of the professional.

### Reasons for published information on professional competency identification

The focus of this section was on professional competency identification for teacher education programs. The majority of published information on sources has come from educators and researchers in teacher education programs. The proliferation of research in competency-based education has resulted in part from the demand by the public for accountability in educational programs and the subsequent federal funding. Much published information on sources of competency identification has resulted. Research on competencies in vocational education has been conducted and reported, but the topic of sources of competency identification has not been the primary focus. The next section pertains to sources of

competency identification used by vocational educators in occupational studies.

#### Research Methods for Task and Competency Studies in Retailing and Merchandising

Various sources for competency identification have been used in the occupational areas of retailing and merchandising. Many times, researchers used a combination of sources such as task analysis and expert judgment.

Carmichael (1968) conducted a task analysis to determine the common and identifiable activities of retail midmanagers. He used a combination of personal interviews with executives and a questionnaire listing activities which was completed by midmanagers. Carmichael's statements vary from explicit statements of tasks to more global statements of competencies.

The list of activities was developed with information from: interviews with retail executives, observations of retail management personnel, examination of job descriptions furnished by retail organizations, a review of lesson plans from postsecondary programs, textbooks on retailing and retailing management, interviews with retailing and marketing educators, and a review of literature pertinent to the nature of the management function.

Crawford (1967) conducted a curriculum study using a competency pattern approach. In her study competencies were

developed based on task analyses for selected categories of businesses: department stores, variety stores, food stores, service stations, wholesaling, hotels/motels, and restaurants. Results and procedures pertaining only to the department store sample are discussed here. Jobs were divided into three categories: entry level, first step career continuum, and second step career continuum.

Interviews pertaining to critical tasks were conducted with firms in three cities. Six interviews were conducted for each of the 18 jobs in the department store category. For entry level, a full-time employee who had worked on the job for approximately one year and an immediate supervisor or department manager of the full-time employee were interviewed. The firms selected employees who could best respond to questions of the interviewer. To study the next two career levels of jobs, researchers on the project conducted interviews with full-time employees in the first and second levels and with a full-time employee who was next in line of authority to the job being studied.

Supervisors and employees responded as to frequency of performance on each task. A task was deleted if the majority of the respondents in the three cities indicated that the task was never performed. All tasks were then compiled under the subject matter headings.

A tentative list of competencies needed to perform the

identified critical tasks was developed using related literature, personal experience of the investigator, and conversations with business people. Each statement was accompanied by numbers referring to jobs which seemed to require that competency. This list was reviewed for clarity and appropriateness by two distributive education specialists. Specialists were asked to agree or disagree with the grouping of jobs under each competency statement and were instructed to delete jobs if the competency was not needed and to add other jobs where it was deemed appropriate. Revisions were made after the investigator consulted with the distributive education specialists.

The competency statements were listed under the major areas of work (i.e., display, merchandising, etc.). A cross-tabulation of competencies needed by the type of job was presented which highlighted the cores of competencies needed by a number of workers.

Interpretation of findings was limited in Crawford's study due to the small number of respondents. The importance of competency statements as well as the grouping of competencies in work categories may be questioned because only six persons were assigned to evaluate the importance of tasks and competencies.

Rouston (1964) used an observational approach for conducting a task analysis; he called this the "shadow technique."



He observed the activities of sales clerks in department stores for several days during a seven-week period. The findings provided data useful for curriculum development in training programs. His technique has certain limitations; it is most effectively used for an occupation where limited responsibilities are involved, such as sales clerk. This technique could be used for the initial step in determining competencies for a more professional job. The skills, knowledge, and attitudes necessary to complete the task would subsequently have to be determined.

The critical-incident technique developed by Flanagan (1954) is another form of a task analysis. This technique involves an interview with the supervisor of the individual to be evaluated. The interviewer attempts to gain information about the subject's specific behavior patterns which are related to the skills being studied. This technique permits the collection of a large amount of data on activities of workers without the expense and time involved with a method such as the "shadow technique." The investigator can also gain more in-depth information on the activities through the interviews. Carmichael (1968) used an adaptation of this technique in his personal interviews to determine activities of retail midmanagers.

Baker (1975) developed a list of competency statements for clothing alteration and fabric services occupations based

on task analyses for these occupations (University of Northern Iowa, 1974). Competencies were defined as understandings assumed to be involved in performing the various tasks. The statements were compiled in checklist form and categorized under major activity headings. Respondents from a random sample of business persons in alteration services and fabric stores rated the items according to degree of importance: 1) not needed, 2) essential for entry, 3) best gained after entry, and 4) necessary for advancement. Data analysis consisted of frequencies and percentages. Interpretation of findings was limited by a low response rate and by the format of the questionnaire. Because a category response format rather than a numerical response format was used, means and variation in responses could not be examined. A more sophisticated analysis, such as cluster or factor analysis, could not be used to group the items conceptually because of the questionnaire format.

LaSalle (1973), using a Q-sort technique, conducted a study to identify factors and concepts which could provide insights for curriculum development in retail management programs. The purposes of his study were to identify a set of competencies required by retail midmanagers in the Commonwealth of Massachusetts and to determine where the competencies would best be obtained.

LaSalle used a form of the course translation approach

to develop competency statements. The statements were based on educational outcomes in subject matter areas which could be considered of possible value as preparation for midmanagement positions in retail stores. The statements were essentially educational objectives in the form of a skill, knowledge, or attitude. Curriculum guides and college catalogs were reviewed prior to the competency development. A committee consisting of retailers reviewed the statements and made recommendations. LaSalle did not use prior research findings on tasks performed to develop his list of competencies.

LaSalle conducted interviews with executives and mid-managers from retail outlets randomly selected throughout the state. Data were collected using different types of instruments: 1) an interview guide with open-ended and fixed alternative items and 2) a forced choice and a free choice Q-sort.

Respondents sorted the deck of cards twice. In the free choice sorts, all respondents sorted the 30 statements into seven piles, ranging from 1 (most important) to 7 (least important). A second sort, the forced-choice, was required. This step required the respondent to state where the competency should be obtained. Three piles were used for this sort: 1) those abilities best obtained from a formal educational program prior to hiring, 2) those best obtained in a

formal cooperative training program, and 3) those abilities that can be learned while working on the job without a formal training program.

Weighted mean scores were examined by groups and items were ranked by level of importance. Differences and similarities between groups were also examined. Competencies were then used as the basis for curriculum development in retail programs at the community college level. The findings of the study also provided insights into the role of the community college.

Walsh (1958) conducted research to determine competencies needed by trade and industrial teachers. This study was not in retailing or merchandising but is included here because it provides a good example of "expert judgment" to identify competencies. One of the purposes of his study was to validate the functions and competencies necessary for successful trade teaching in order to establish criteria for a trade and industrial training curriculum. Walsh stated that competencies form the basis for evaluating and improving the curriculum for the training of trade and industrial teachers.

Walsh (1958) developed an original list of 423 competencies based on a review of pertinent literature. Competencies of two types were considered: 1) those in the area of knowledges, understandings, and concepts, and 2) those which imply action or the ability to use skills and tech-

niques. An advisory panel reviewed and discussed the list of competencies. Walsh did not specifically mention using a theoretical model of instruction to develop competency statements, but this approach might provide additional insights.

A jury of 46 qualified trade and industrial educators responded to the preliminary questionnaire. The ratings were examined and all suggestions were reviewed. The instrument was revised and items were reduced to a total of 107 on the final form of the questionnaire.

Respondents to the final form of the questionnaire were selected nationally from professional groups in trade and industrial education. Weighted means were calculated for each item and items were examined separately by responses of sample groups.

#### Findings from Task and Competency Studies in Retailing and Merchandising

The previous section dealt with sources for competency identification. The findings from task analyses and competency studies in retailing and fashion merchandising are presented in this section. These findings were used to develop competency statements for the present study.

### Competency studies

A study by Greenwood (1972) at Oklahoma State University involved an evaluation of an existing fashion merchandising program through faculty input on course objectives and merchandising professionals' appraisal of competencies needed to perform their jobs. Purposes were: to evaluate the adequacy of the preparation of fashion merchandising majors for selected positions in business and to make recommendations for maximizing the development of competencies associated with the career area especially as related to student work experiences.

Greenwood's study provided information about the primary and sometimes overlapping responsibilities of buyers and assistant buyers in fashion merchandising. The questionnaire included items on responsibilities, duties, competencies, and abilities. Duties were stated as explicit tasks. The competencies and abilities tended to be more global in scope but so were many of the responsibilities. Thus, there were not clear distinctions among the groups of items. Some items were written on a competency level and some at a task level. Because of the multiple categories of items and the findings pertaining to the overlap in responsibilities, a composite of competencies needed by entry and midmanagement personnel could not be distinguished.

In the initial stage of the study Greenwood (1972)

determined the major objectives and terminal behaviors expected of students for the required departmental courses. The second stage of the study involved identification of job descriptions for the positions which cluster around the retail buying functions. Competencies associated with the responsibilities and duties performed in entry level merchandising positions were also identified.

The sample consisted of buyers and assistant buyers in major department stores of the central part of the United States. Letters of inquiry were sent to personnel directors of 12 department stores requesting names of buyers and assistant buyers to participate. The criteria for selection of participants were: 1) one year or more of employment in the fashion division of the selected store, 2) graduate of a four-year college or university, and 3) interest in participating in the study. Personnel directors submitted the names of 93 buyers and assistant buyers. A total of 58 of the 93 buyers and assistant buyers responded to the questionnaire or a 62% response rate.

The questionnaire items were developed on the basis of a merchandising task analysis (Greenwood, 1969). The instrument was designed to collect information pertaining to several topics: 1) job titles and hierarchy of positions, 2) responsibilities, duties, competencies, and abilities involved with performing the various buying functions, and

3) academic learning experiences. Analysis of data involved frequencies and percentages. No tests of significance were done to identify differences in response between buyers and assistant buyers.

Job titles varied from store to store as did the patterns of hierarchy or career paths. Greenwood speculated that the variations reflected the many organizational changes taking place in the retail industry. One trend specifically mentioned was the expansion of branch store operations.

Greenwood examined activities related to five buying functions: 1) planning and evaluating merchandise, 2) procuring merchandise, 3) promoting sales, 4) merchandising departments, and 5) supervising personnel. Each function was discussed separately according to which type of personnel, assistant buyer or buyer, had primary responsibility.

Buyers had major responsibilities in planning and evaluating merchandise. The responsibilities pertained to the development and revision of seasonal merchandise and promotion plans. Assistant buyers had minor or no responsibility in this area.

In the area of procuring merchandise, buyers had major responsibilities and assistant buyers had minor or no responsibilities. These tasks included buying activities, pricing, and maintaining proper relations with manufacturers. Assistant buyers had major responsibilities for directing the



transfer of merchandise and maintaining procedures for orders.

Buyers had major responsibilities in most activities related to promotion of sales. Assistant buyers had major responsibilities in some areas of promotion: ensuring accuracy of facts in advertisements and supervising preparation of ad sheets.

Both buyers and assistant buyers indicated that activities involved with merchandising departments were major responsibilities. These activities involved presentation of merchandise, maintenance of merchandise control systems, and transmission of merchandise information to others. The assistant buyer was considered to be more responsible than the buyer for maintaining proper systems and procedures in merchandising.

A majority of the buyers had major responsibility for supervising personnel. Over 50% of the assistant buyers considered six of the ten activities in this area to be their major responsibilities also. Assistant buyers had greater responsibilities in the functional area of supervising personnel than in any other area.

In summary, data indicated the shared nature of these buying responsibilities between buyers and assistant buyers, especially in supervising personnel and merchandising departments. Buyers had the major responsibilities in the other three areas.

Greenwood also investigated duties of buyers and assistant buyers: maintenance of records, maintenance of stock, and miscellaneous activities. The majority of duties were performed on a "regular or as needed" basis by 50% or more of buyers and assistant buyers.

Greenwood investigated the competencies and abilities needed to perform buying functions. The competencies considered vital by over 90% of the respondents included: making judgments based on facts at hand, organizing and delegating intelligently, and perceiving the nature of merchandise trends.

Greenwood did not include in the questionnaire many statements pertaining to skills needed to work with customers. Carmichael (1968) had found that entry level workers handled direct sales and midmanagers served as back-up. Another competency area that was not developed included those competencies pertaining specifically to textiles and clothing.

For purposes of curriculum development at the community college level, LaSalle (1973) identified competencies needed by retail midmanagers. Respondents included 104 executives and midmanagers from large and small retail stores randomly selected throughout the state of Massachusetts. Two instruments were utilized: 1) an interview schedule containing open-ended and fixed alternative items, and 2) a forced choice Q-sort. Data from the Q-sort were analyzed using rank order correlation methods and mean analysis. The Q-sort cards with

competency statements were sorted into piles ranging from most important to least important with numerical values ranging from six to zero respectively. The means were based on these values.

In the interview midmanagers were asked to define their job in terms of the proportion of time spent performing specific duties. A large percentage (65.38%) indicated that they spent most of their time on personnel duties. Merchandise control was judged by 46.15% of the respondents to occupy most of their time. Approximately 30% of midmanagers indicated that these duties occupied most of their time: merchandise selection and buying, pricing, promotion, personal selling, and budgets. These percentages were not accumulative; the individuals did not rank all the tasks from "most" to "little" proportion of time spent. The respondents indicated for each task whether the proportion of time spent was "most," "some," or "little." So the percentages were accumulative across responses on that task.

A total of 30 competency statements were compared in the Q-sort. There was a high level of agreement between rankings of executives and midmanagers. The three most important competency areas were: 1) to plan and direct the work of others, 2) to recognize and evaluate alternative solutions to business problems, and 3) to be familiar with general principles of retail merchandising.

### Task analyses

Ertel (1967) identified major tasks performed by non-supervisory personnel working in three Standard Industrial Classifications of retail establishments: department stores, limited-price variety stores, and general merchandise stores. The objectives of this study were to obtain facts about what major types of tasks are performed in retail occupations and to identify major types of knowledge most likely to prepare them for such work.

Training department personnel were interviewed to gain information on categories of work. Respondents reported in terms of frequencies of performance by supervisory and non-supervisory personnel. Results were reviewed and a list of 300 activities in the 12 major task areas was placed in questionnaire format. Respondents indicated frequency of performance. A total of 609 supervisory and nonsupervisory personnel in three different types of stores responded. Frequency of performance was analyzed along with differences between store types and types of workers.

A substantial percentage of nonsupervisory personnel indicated that selling, stockkeeping, cashiering, receiving, display, and record keeping were major tasks within their jobs. Substantial percentages of supervisory personnel

indicated that they performed all the above tasks in addition to advertising, pricing, buying, and controlling functions. The tasks of buying, pricing, and controlling merchandise were unique to supervisors in all types of stores.

Relatively few respondents indicated that activities in display and advertising were major responsibilities. The evidence suggested that the technical aspects of preparing and placing advertisements were performed by specialists within the store. The primary responsibility of supervisors in this area consisted of coordinating the advertising with the in-store selling program.

A majority of supervisors performed all activities in the tasks of computing information using mathematical skills. Nonsupervisory personnel utilized mathematical skills to a limited extent.

A greater amount of task specialization was noted in department and variety stores than in general merchandise stores. The specialization was most evident in the areas of receiving and marking merchandise, operating the checkstand, keeping accounts and records, computing information using mathematical skills, display, and advertising. A significantly larger proportion of nonsupervisors performed these tasks in the general merchandise store than in the other two types of stores.

In summary, findings pertinent to the present study

included: supervisory personnel performed many managerial duties, but also routine duties needed for day-to-day operation; few respondents indicated that display and advertising were major responsibilities; greater task specialization was noted in department and variety stores than in general merchandise stores.

Implications for curriculum development in distributive education were derived from the findings. The primary emphasis in the curricula for programs aimed at preparing non-college bound youth for entry positions in merchandising should be with competencies needed to perform the selling, stockkeeping and cashiering functions.

Carmichael (1968) derived a taxonomy of common and identifiable activities of retail midmanagers in independent department stores, department store chains, discount stores, and variety stores. Purposes of the study were to: 1) establish a list of marketing and distribution activities performed by midmanagers, 2) determine if responsibilities differ by store type, 3) determine if responsibilities differ by level of management, 4) determine if activities differ by functional area of employment, and 5) determine the hierarchy of positions in midmanagement. The findings in this study provided insights into which tasks were perceived to be crucial to success in retailing.

In this study, Carmichael administered a retail manage-

ment questionnaire to midmanagers and interviewed retail executives. The questionnaire contained 202 statements that described activities performed by a wide range of managerial personnel. Statements were derived from various sources: pertinent literature, interviews with retailers, observation of retail management personnel, examination of job descriptions, review of lesson plans and textbooks, and consultations with retail and marketing educators. Respondents indicated the frequency of performance and level of importance for each activity.

Fifteen firms were contacted and 14 agreed to participate. The questionnaire was mailed to 846 midmanagers in the various stores and 701 respondents returned usable questionnaires.

The interviews were conducted at the home offices of the 14 participating firms. At least one executive was interviewed and also a proportional sample of midmanagers selected from the various levels of management. Questions pertained to the retail management hierarchy, definitions and criteria used by firms in the retail industry, and information on skills and abilities needed by retail midmanagers.

The findings indicated that many activities were common to a wide range of positions and that some activities were unique to certain management positions. Thus, there were clusters of activities that were crucial to the success of

retail managers.

Carmichael found that the top-rated selling activities for midmanagers related to satisfying customers rather than actually selling to them. Midmanagers were making decisions about display location and advertising, but not actually performing activities in these areas. Safeguarding merchandise and controlling current stock levels were crucial activities. Three areas in marketing research were rated as crucial:

1) knowledge of the consumer, 2) knowledge of one's competitors, and 3) forecasting sales and future events. One activity which was rated as crucial to success by 99% of the respondents was "following instructions from supervisors."

The most crucial of all competency areas was "managerial." Out of 78 activities, 64 were judged "core-crucial." The activities pertaining to supervision, decision-making, problem-solving, communicating, human relations, analysis, and innovation were found to be most crucial.

The activities of midmanagers differed depending on the type of firm. The midmanager in a traditional department store is more of a specialist with fewer activities to perform than those in discount, chain and variety stores. The midmanager in a variety store is more of a generalist.

The activities of midmanagers did differ by level of management in which they were employed. Level 1 (the lowest) reported that selling activities were most crucial; Level 2-



sales promotion, buying, and operations activities; Level 3-sales promotion, buying, operations, and directing activities; Level 4-managerial activities.

The level of "middle management," defined in this study as all management from first-line management up to but not including the corporate level, did exist in the retail firms. Middle management positions were not organized in discrete levels but were overlapping and continuous.

In an effort to determine the merit of a four-year fashion merchandising program at Florida State University, Cole (1974) conducted a program evaluation involving curriculum offerings and students' performance during their internships. Participants in the study were in three sample groups: graduates of Florida State University from 1969 to 1973, merchandising personnel who had cooperated in the internship program, and faculty in residence at FSU.

The questionnaires were mailed to 227 graduates, 19 retail stores, and 10 faculty members. All groups evaluated the courses required of fashion merchandising majors during the period 1969-1973. In addition to the course evaluation, store personnel evaluated the performance of interns and former graduates of the program. Response rates were as follows: 50.5% response to the graduate questionnaire, 68.4% for the store personnel, and 80% for faculty members.

The three groups of respondents rated the following

courses "very good:" basic textiles, basic construction, merchandising, business, and marketing. An art course designed for nonmajors received the lowest rating (fair) given any course by the three groups. "Family clothing and the social order" was also rated as "fair" by the graduates and store participants, but was rated as "good" by faculty. The practicum was rated by all respondents as a very valuable experience. The courses rated lowest by business personnel and graduates included design, art, and sociological aspects of clothing.

One assumption with this part of the questionnaire on course evaluation was that all respondents were aware of course content and could knowledgeably evaluate the courses in relation to students' needs. The faculty members and students would probably be qualified, but there is doubt that the store participants would have adequate knowledge of the course content to make these decisions. Business respondents may have been expounding a belief that courses in merchandising and business are important, regardless of a knowledge of specific course content. In this situation a list of tasks or competencies would be a better instrument to which business personnel could respond.

In the questionnaire for store personnel, Cole (1974) inquired into the performance of interns and graduates of the program at the participating stores. Selected characteristics

of the interns were rated by the business personnel: personality traits such as "ability to get along with others;" aptitudes such as "merchandising potential;" and personal habits such as "grooming." In general the interns rated fairly high in every area with the exception of grooming habits. Some of these characteristics could have been altered by an educational program, but others were basic personality traits or habits which may or may not have been influenced by the educational program.

Findings in Cole's study which were most relevant to the present study pertained to the percentage of time spent by merchandising employees on different tasks. The greatest amount of time was spent on planning, evaluating, and merchandising. Activities included under these categories were: calculating markups and markdowns, evaluating success or failure of sales promotions, examining sales figures, transferring merchandise, and conducting stock counts. The third largest area of activity was personnel supervision; promotion and merchandise procurement followed as fourth and fifth, respectively. However, the amount of time spent does not necessarily indicate level of importance. It does mean that some training should be planned because time is spent on these functions.

### Summary of tasks and competency studies

Findings in some of the reported studies pertained to tasks and some to competencies; thus it was difficult to compare results. The general areas of work which were identified by researchers included: planning and evaluating merchandise, procuring merchandise, promotion, personnel supervision, merchandise control, and working with customers. Greenwood (1969) found that assistant buyers shared responsibilities with buyers in the areas of merchandising departments and supervising personnel. In LaSalle's (1973) study the largest percentage of midmanagers indicated that they spent most of their time on personnel supervision. Merchandising personnel in Cole's (1974) study spent the largest percentage of time on planning, evaluating, and merchandising.

The categories of tasks or competencies used by these researchers were not always similar in content, so it would be difficult to merge their ideas. In all studies reviewed for the present study, the researchers had grouped items according to functional areas of work and in no study were the responses of the subjects used as the basis for classifying the items.

## PROCEDURE

The conceptual framework and methodology for this study, derived from other related studies and relevant textbooks, served as the basis for the operational plan that is presented in this chapter. Discussion of the procedure includes objectives of the study, hypotheses tested, assumptions and limitations, sampling methods, development of competency questionnaires, collection of data, and analysis of data.

### Objectives of the Study

The objectives of the study were to: 1) identify the competencies perceived as important by business persons and postsecondary educators for fashion merchandising personnel at the entry and midmanagement level in department and specialty stores; and 2) to contrast the competencies perceived as important between business personnel and postsecondary educators; between respondents in different geographical locations; between business personnel in department stores, specialty stores, and chain department stores; and between educators and business personnel with varying amounts of work experience and different levels of education. This study was part of a larger project, "Standards for Textiles and Clothing Postsecondary Programs" (Note 1). Competencies and program

standards were also validated for three other textiles and clothing related occupations: fashion design, apparel services, and window treatment services.

### Hypotheses Tested

The hypotheses tested in this study were:

1. There will be no difference in response between the level of importance on midmanagement and entry level items as judged by postsecondary educators and business personnel.
2. There will be no difference in response between postsecondary educators and business personnel on entry level competencies.
3. There will be no difference in response between postsecondary educators and business personnel on midmanagement level competencies.
4. There will be no relationship on judged entry level competencies by postsecondary educators and business personnel by: age, sex, years of merchandising experience, educational level, years of teaching experience, geographic location, and position.
5. There will be no relationship on judged midmanagement competencies by postsecondary educators and business personnel by: age, sex, years

of merchandising experience, educational level, years of teaching experience, geographic location, and position.

#### Assumptions and Limitations

The present study was conducted under the following assumptions:

1. The statements adequately represent the competencies of the occupation.
2. Respondents are able to make independent judgments on each competency as to level of importance for midmanagement and entry level positions.
3. The business respondents are well-qualified to react to the competencies needed by workers because they were personally recommended by educators in their geographic area to be well-informed in that field of work.

The limitations of the study were as follows:

1. This study was limited to the competencies needed by persons employed in the following types of retail organizations: 1) independent department stores, 2) chain department stores, and 3) specialty stores.
2. The method for sample selection was deliberate, not random, thus the results cannot be generalized to the total population of persons employed in mid-

management and entry level positions in these three store types.

### Sampling Methods

There were two deliberate samples used in this study. The first consisted of postsecondary educators in fashion merchandising and the second of business personnel in fashion merchandising.

#### Identification and selection of the sample groups

The first stage of the study involved identification of postsecondary programs offering Associate degrees in fashion merchandising and retailing/business management with an option in fashion merchandising. Letters were sent to home economics supervisors in all state departments of public instruction requesting names of institutions offering such programs (Appendix A). It was decided to survey only postsecondary programs, and not four-year programs, due to time and financial limitations and also limitations presented by the funding source (Department of Health, Education, and Welfare, Office of Education).

After receiving correspondence from a majority of the states, the number of programs appeared fewer than expected in some areas, so alternative measures were chosen to further investigate the location of programs. Catalogs of junior



colleges and community colleges were examined to locate additional programs. Where the number of programs as identified by state department personnel did not coincide with information from catalogs, telephone calls were made to the state departments of public instruction. Catalogs could not be used as the only source of information, as some of the programs listed were not in existence and many times the catalogs were not complete. Another reason for the small numbers of programs in some states was that merchandising programs were under the jurisdiction of various sections within the state departments of public instruction. In many states, fashion merchandising was under distributive education or the programs were offered at private institutions and were under the jurisdiction of the division which licensed and supervised private junior colleges.

General information about the fashion merchandising programs was obtained in a questionnaire mailed to a selected sample of 96 programs in December, 1977 (Appendix B). This sample consisted mainly of those institutions which had been identified by home economics state department personnel. The purpose was to ascertain information about the types of programs, courses taught, books and other resources used, and other topics related to program standards. This questionnaire was part of the larger project but did provide information about the merchandising programs in general and reference

materials currently being used for instructional purposes. There was a total of 59 usable questionnaires from fashion merchandising educators.

#### Obtainment of cooperation from educational institutions

A letter was developed which requested the cooperation of the educational institution in the fashion merchandising competency and program standards study. Also names of two merchandising persons within their geographical area were requested in this letter (Appendix C).

The plan for obtaining the business personnel sample was to request of the educators names of business personnel who had either cooperated with the program (i.e., an advisory committee member) or had hired a former graduate. The decision to use a deliberate sampling procedure was made due to the very low response rates which had been encountered in other competency studies where business names were drawn randomly from telephone directories (Baker, 1975; Flaxman, 1973). It was also felt that these persons would be more likely to respond to a questionnaire related to educational program planning as they were familiar with and had previously shown interest in the educational process. The intent was to have the competency statements judged by individuals knowledgeable of the programs and of the competencies necessary for successful employment.

The letters requesting cooperation were mailed in April, 1978, to the list of 141 postsecondary programs in fashion merchandising. Two follow-up postcards were mailed; one at three weeks and another at five weeks after the initial mailing. In May, approximately 60 telephone calls were made to institutions which had not returned their letters; consent was obtained from many of these schools. It was necessary to delay additional follow-up activities until late August and early September due to summer vacation. More phone calls were then made and additional schools consented. But due to financial and time restraints, not all programs were called.

Educators in 97 programs had agreed to participate in the study. Letters of cooperation sent to educators provided the names of 148 business persons in department and specialty stores.

#### Development of Competency Questionnaires

The literature was reviewed which related to task analyses and competency validation studies in fashion merchandising, retail management, and distributive education. Studies which included competency identification as a part of program evaluation were also reviewed. Textbooks in fashion merchandising and retail management were utilized as a supplementary source to identify knowledge which might be necessary to perform specified tasks within the occupation.

### Development of the competency framework

The framework used for developing the competencies was adopted from a list of six distributive education competency categories developed by Nelson (Note 4) in a study sponsored by the U.S. Office of Education. The framework was as follows: 1) selling, 2) sales promotion, 3) buying, 4) operations, 5) market research, and 6) managerial--planning, directing, and coordinating. Justification for using this framework was based on the similarity of competency or activity categories identified by other researchers: Crawford, (1967), Ertel (1967), and LaSalle (1973). In addition, a list of textiles and clothing competency areas was developed from some of the competency areas identified as important by Greenwood (1972) and Cole (1974), and from a fashion merchandising text by Troxell (1976).

The textiles and clothing categories were: 1) textiles and the textiles industry, 2) fashion industry, 3) art principles related to clothing selection and fashion promotion, 4) product evaluation, 5) sociological-psychological aspects of clothing, and 6) historical and economical factors related to clothing.

### Development of the competency statements

The tasks and competencies identified as important by Greenwood (1972), Carmichael (1968), LaSalle (1973), and

Crawford (1967) were grouped under the various categories. Competency statements were written under each category utilizing information from the studies and text books. A total of 50 statements were written for the preliminary questionnaire; these were reviewed by a person formerly employed in fashion merchandising and suggestions were used for revisions. The items were randomly ordered to assure that they were no longer grouped in the categories and their position would be less likely to influence judgments on similar items.

#### Pretesting of the preliminary questionnaire

A group of experts, consisting of educators and business persons, was selected to review the competency statements for appropriateness and clarity (Appendix D). The group's membership was as follows: three textiles and clothing college educators, two postsecondary fashion merchandising educators, two business persons from apparel specialty stores, and two business persons from department stores. One evaluation expert examined the statements and instructions for usability and appropriateness of scale.

The experts individually examined the items and made suggestions. A letter of transmittal, the categories for competency development, and an instruction page accompanied the preliminary form (Appendix E). The suggestions were recorded

and changes were made in the competency statements. Many of the changes were related to syntax; the terminology used was too educationally oriented. Another change made at this time was to alter the certainty response pattern from "1 to 99" to "1 to 11." Two of the business persons and one postsecondary educator indicated that the "1 to 99" scale was too complicated and that they would be hesitant to complete a questionnaire form with such a scale. The item pertaining to developing and implementing a training plan for new employees was split into two separate items; one pertained to developing training programs and the other to carrying out existing training programs.

The original purpose for the questionnaire, to validate competencies needed for midmanagement positions, was altered due to a suggestion by one of the textiles and clothing educators. It was pointed out that the findings would not provide information on the competencies needed for entry level positions in fashion merchandising, where most graduates would find employment. The identification of competencies needed at both midmanagement and entry level would provide needed guidance for curriculum planning.

In order to provide information on the competencies needed for both levels, a multiple column response format was chosen. The questionnaire was designed so that the competency statements could be judgmentally validated by

each respondent as to how important it was as a behavior for midmanagement and entry level positions in fashion merchandising. The form had two columns in which ratings were made. The participant could respond in each column with any number from 1 to 11. Numbers from 7 to 11 indicated that the competency was important. Numbers from 1 to 5 indicated that the competency was not important. A score of 6 was used to indicate uncertainty of the importance of the competency.

#### Production of final questionnaire forms

The final questionnaire consisted of 51 competency statements. Separate forms were prepared for business persons and educators. Since consent had been obtained from a majority of educators, it did not seem necessary to use a personal salutation and cover letter with each questionnaire. So a standard cover letter became the first page of the questionnaire booklet (Appendix F). The sample of business persons had not been previously contacted and it was felt that a more personal letter was necessary to assure a higher response rate. A separate letter of transmittal was printed in addition to the questionnaire booklet. The first page of the business questionnaire stated the title of the instrument, "Competencies for Occupations in Fashion Merchandising." The letter of transmittal included a personal salutation and a sentence explaining who had recommended them for the

study. The materials mailed to business personnel are presented in Appendix G. The letter of transmittal for both questionnaires familiarized the participants with the study and stressed the importance of their input.

#### Collection of Data

The sample of 333 was divided into two groups: 185 postsecondary educators and 148 business personnel. The educators were mailed a questionnaire and a stamped addressed envelope was provided for questionnaire return. Business personnel received the other questionnaire, the separate letter of transmittal, and a stamped return envelope.

Two weeks after the mailing in October, 1978, 79 of the 333 sample members had responded. Follow-up procedures were begun at that time.

The 254 members of the sample who had not responded were mailed a postcard. Separate postcards were printed for educators and business personnel. The postcards were perforated so that one-half of the card could be returned explaining the status of the respondent's questionnaire. Different colors were also used to facilitate handling the return mailing. These postcards appear in Appendix H. Seventy-eight usable questionnaires were returned after this mailing.

The second follow-up consisted of a single postcard which reminded the participant of the importance of the individual's



input. This card was mailed two weeks after the first follow-up. Eight questionnaires were returned subsequent to the second follow-up.

After another two-week interval the perforated postcards were mailed again to members of the sample who had not responded. The completion of the third follow-up mailing was in early December. A few telephone calls were made, but the persons were too busy to respond. Due to the heavy working schedules of business personnel and school vacations of the educators, the follow-up activities were curtailed until after the holidays. At the end of December, 199 questionnaires had been returned. There were two questionnaires which were not usable.

In January and February, telephone calls were made to all business persons who had not responded. Questionnaires were resent if the persons consented to complete the form. Approximately one-half of the educators who had not responded were contacted; the class schedules and work routines made it difficult to contact the faculty members. Due to time and financial restraints, the remaining educators were not contacted.

The figures for the invited sample and data producing samples are presented in Table 1. The number in the invited sample was altered due to: problems encountered with members of the two sample groups no longer employed; and programs of

Table 1. Invited and data-producing samples

Sample Group	Initial Number	Adjustment Figure	Invited Sample	Accepting Sample	Data Producing Sample	Percentage of Invited Sample
Educators	185	9 <sup>a</sup>	176	105	105	60%
Business Personnel	148	7 <sup>b</sup>	141	117	116	82%
	—	—	—	—	—	—
Total	333	16	317	222	221	70%

<sup>a</sup>The adjustment figures included those respondents where the questionnaires were not deliverable, the instructor or coordinator was no longer available, or the program did not exist.

<sup>b</sup>The adjustment figures included those respondents where the questionnaires were not deliverable, the questionnaire was not appropriate for the business, or the business was no longer in operation.

businesses not appropriate for the sample. The number of questionnaires initially mailed was 333. Nine members of the educators' sample were eliminated for the following reasons: 1) two programs were not appropriate (marketing only); 2) in one case there was a mixup of addresses and two questionnaires were sent to the same school; 3) one of the sample members was no longer employed and no replacement had been found; 4) in four cases, where consent had not been obtained prior to the questionnaire mailing, there were no fashion merchandising programs; and 5) in one institution two questionnaires were mailed and one was sent to the chairman of marketing who did not feel adequately prepared to respond to the questionnaire. In the business sample seven members of the initial group were eliminated: 1) in two cases the respondents indicated that their places of business did not handle fashion merchandise and 2) five members of the group were no longer employed with the business and there were no forwarding addresses available. Altogether 16 members of the initial group were eliminated, leaving an invited sample of 317. The accepting sample was 222 and the data producing sample was 221.

#### Analysis of Data

The data analysis consisted of several parts. Importance of competencies was examined along with variability,

that is differences between groups of people or between competencies. Data for entry and midmanagement levels were factor analyzed and demographic variables were correlated with the factor scores.

#### Importance of entry and midmanagement competencies

Mean scores for entry and midmanagement items were transformed to normalized ranks and then ranked from high to low. This transformation involved changing the numerical value of each of the 11 ordered categories to its corresponding normalized rank (Wolins & Dickinson, 1973); "1" = "-1.586," "6" = "0," and "11" = "1.586." A cut-off point was established for those competencies considered important.

#### Variability between educators and business personnel

The variability in response between educators and business personnel on the midmanagement and entry level competencies was examined using scattergrams. Mean scores for each item based on the transformed value were plotted in a scattergram. The F values, reflecting a significant amount of variation in response between the two groups, were not meaningful because when the total set of responses was examined educators as a whole responded higher on the scale than business personnel. Individual items which appeared to be outliers were examined.

### Variability on midmanagement and entry level competencies

Responses for the whole group were pooled and the mean of these transformed scores for midmanagement and entry level competencies were plotted on a scattergram. The variability in response on the importance of the competencies was examined.

### Variability between respondents in the business sample

The variability in response between respondents in different types of retail stores was examined using scattergrams. Mean transformed scores were plotted for midmanagement and entry level competencies for each combination of the types of stores; a total of six scattergrams was made. Outliers, items where there was considerable disagreement, were examined.

### Factor derivation

The variation in response between educators and business personnel and within these groups was examined to determine the feasibility of factor analyzing the data for both levels (midmanagement and entry level). The between group variation was of substantial magnitude for most entry and midmanagement level items; the within group variation was of a lesser amount. There was sufficient variation on both entry and midmanagement level items to factor analyze the data. The pooled within correlations were used for the factor analysis; there-

fore between group variance was partialled out before this analysis. The extraction of factors was accomplished through the method of principal components; the largest correlations were placed on the diagonal and the factors were rotated by Varimax (Kaiser, 1958).

The number of factors for entry and midmanagement that were rotated was based partly on the examination of Scree plots (Cattell, 1952) and partly on the judgment of rational content of the items loading on the factors. A Scree plot is a scattergram of the eigenvalues and factor numbers. For entry level the curve dropped rapidly and leveled out at approximately four factors (Appendix I). Factors for entry level competencies were rotated and results of four, five, and six factors were derived. The items in the four factor results had higher factor loadings and made more intuitive sense than did the items in the five and six factor results. Based on the Scree plot and the conceptual cohesiveness of the items, the four factor results were further examined.

For midmanagement items the curve of the Scree plot dropped rapidly at first, but appeared to flatten out at nine factors (Appendix J). Factors were rotated and results for four through eleven factors were derived. The nine factor solution provided factors which made intuitive sense. Based on the results of the Scree plot and the conceptual cohesive-

ness of items, the nine factor results were further examined.

The factor content was determined objectively and subjectively; both factor loadings and congruity of items were examined. Not all items fell discretely into one of the factors, thus item content as well as the extent to which an item loaded on several factors was considered. Criteria for selection of items on the entry and midmanagement factor analyses differed; each set of data is unique and requires independent examination.

For the entry level factor analysis the selection of an item for one scale because of a high factor loading was not done when it loaded substantially on some other factor. This procedure results in lower correlations between scales which, in turn, makes the evaluation of results less ambiguous. Most items actually used to measure a factor had factor loadings in the range of .60 to .80, with the lowest loading being .54.

On the factor analysis for midmanagement items the selection of items for a scale was based on the item content and factor loadings. Items which loaded heavily on one factor but also loaded on another factor were examined for congruity of content with the two factors. Some items were retained even though they loaded on two factors; these were not scored or used for further analysis. These scores were calculated on the basis of factor loadings and subsequently used in the correlational analysis. If the item made intuiti-

tive sense in terms of the conceptual scheme of the factor and loaded above .50 it was scored and used for further analysis. The items which were scored had factors loading in the range of .50 to .80. Construct and overall reliability coefficients were calculated for each factor.

#### Relationship of demographic variables with factor scores

The competency factor scores for entry and midmanagement level were correlated with demographic variables associated with educators and business personnel. Variables for educators and business personnel included region, educational preparation, age, sex, and merchandising experience (see Appendix K for designation of states into regions). In addition, the positions of the business persons and the years of teaching experience for educators were correlated with the factor scores. Correlations significant at the .01 and .05 level were examined.

#### Comparison of store types with designation of position levels and with number of graduates hired

A cross-tabulation of store type by designation of level of the position (entry or midmanagement) was made to determine how the store ranked these positions. The list of merchandising positions is found in the business questionnaire (Appendix G). To determine the types of positions where two-year graduates were being hired, a cross-tabulation was made of store



type by positions that two-year graduates held. These graduates had been hired within the previous two years. Chi square analysis was used to determine if significant differences in response existed between store types.

## FINDINGS AND DISCUSSION

The findings of the study are presented in the following sections: 1) demographic information, 2) competencies judged important, 3) variability in response on entry and mid-management competencies, 4) variability in response between educators and business personnel, 5) derivation of factors, 6) relationships of demographic variables and entry level factors, 7) relationships of demographic variables and mid-management level factors, 8) variability in response between three types of business respondents, 9) categorization of job titles by store type, 10) graduates hired for specific positions by store type, and 11) summary of findings and discussion.

### Demographic Information of Sample

In order to examine differences in responses between members of the sample groups, certain demographic information was collected. Fashion merchandising educators and business persons provided information pertaining to: sex, age, educational background, merchandising experience, geographic location, and job title. Educators were also asked about their years of teaching experience and length and title of the fashion merchandising program. In addition, business respondents were asked questions about their store opera-

tion: number of employees, product mix, and departmentalization.

Respondents in the fashion merchandising sample were from 37 states. The number from each state is presented in Figure 1. The number of business personnel and educators from each state is presented in Table 2. A large percentage (15.8%) of respondents came from California due to the high number of educational programs in that state.

The total data producing sample was composed of 24.4% males and 75.6% females (Table 2). The business sample contained 40% males and 60% females, while the group of educators contained 6.8% males and 92.2% females.

Respondents were represented in every age category from below 30 to over age 61. The sample of educators tended to be younger than the business group; 75% of the educators were age 40 or under and 57.4% of business personnel were in this age category.

The educational level of the total sample was as follows: 22.4% - high school degree or less than an associate degree; 10.0% - associate degree; 40.7% - bachelor's degree; and 26.9% - master's degree (Table 2). A large percentage of educators (49.5%) had a master's degree in comparison to business personnel (6.1%). A large percentage of business personnel held bachelor's degrees (44.7%), but this was closely followed by a group which had less than an associate

# FASHION MERCHANDISING



Figure 1. Number of respondents by state

Table 2. Demographic characteristics of educators and business personnel

Characteristics	<u>Total Sample</u>		<u>Business</u>		<u>Educators</u>	
	No.	%	No.	%	No.	%
<u>Geographic location</u>						
Alabama	3	1.4	2	1.7	1	1.0
Arizona	3	1.4	1	0.9	2	1.9
California	35	15.8	18	15.5	17	16.3
Colorado	1	0.5	0	0.0	1	1.0
Connecticut	2	0.9	0	0.0	2	1.9
Delaware	1	0.5	0	0.0	1	1.0
Florida	15	6.7	9	7.8	6	5.7
Georgia	5	2.3	2	1.7	3	2.9
Illinois	14	6.2	7	6.0	7	6.7
Iowa	16	7.1	11	9.5	5	4.8
Kansas	8	3.6	4	3.4	4	3.8
Kentucky	9	4.1	5	4.3	4	3.8
Maine	1	0.5	0	0.0	1	1.0
Maryland	1	0.5	0	0.0	1	1.0
Massachusetts	3	1.4	2	1.7	1	1.0
Michigan	6	2.7	4	3.4	2	1.9
Minnesota	12	5.3	6	5.2	6	5.7
Mississippi	5	2.3	2	1.7	3	2.9
Missouri	6	2.7	6	5.2	0	0.0
Nebraska	3	1.4	2	1.7	1	1.0
Nevada	4	1.8	2	1.7	2	1.9
New Jersey	2	0.9	1	0.9	1	1.0
New York	7	3.2	2	1.7	5	4.8
North Carolina	2	0.9	1	0.9	1	1.0
North Dakota	4	1.8	3	2.6	1	1.0
Ohio	2	0.9	0	0.0	2	1.9
Oklahoma	2	0.9	2	1.7	0	0.0
Pennsylvania	3	1.4	1	0.9	2	1.9
Rhode Island	1	0.5	0	0.0	1	1.0
South Carolina	3	1.4	2	1.7	1	1.0
Tennessee	5	2.3	2	1.7	3	2.9
Texas	8	3.6	3	2.6	5	4.8
Utah	2	0.9	1	0.9	1	1.0
Vermont	1	0.5	0	0.0	1	1.0
Virginia	1	0.5	0	0.0	1	1.0
Washington	8	3.6	4	3.4	4	3.8
Wisconsin	17	7.6	11	9.5	6	5.7
Total	221	100	116	100	105	100

Table 2 (Continued)

Characteristics	<u>Total Sample</u>		<u>Business</u>		<u>Educators</u>	
	No.	%	No.	%	No.	%
<u>Sex</u>						
Male	53	24.4	46	40.0	7	6.8
Female	164	75.6	69	60.0	95	92.2
Total	217	100	115	100	102	100
<u>Age</u>						
30 or under	79	36.0	35	30.4	44	42.3
31-40 years	65	30.0	31	27.0	34	32.7
41-50 years	44	20.0	29	25.2	15	14.4
51-60 years	29	13.0	19	16.5	10	9.6
61 or older	2	1.0	1	0.9	1	1.0
Total	219	100	115	100	104	100
<u>Educational background</u>						
Less than A.S. or A.A. or no degree	49	22.4	42	36.9	7	6.7
A.S. or A.A.	22	10.0	14	12.3	8	7.6
B.S. or B.A.	89	40.7	51	44.7	38	36.2
M.S. or M.A.	59	26.9	7	6.1	52	49.5
Total	219	100	114	100	105	100
<u>Merchandising experience</u>						
Less than 1 year	6	2.8	3	2.7	3	2.9
1-2 years	21	9.6	5	4.4	16	15.2
3-4 years	48	22.0	16	14.2	32	30.5
5-6 years	25	11.5	12	10.6	13	12.4
7-8 years	26	11.9	18	15.9	8	7.6
9 or more years	88	40.4	59	52.2	29	27.6
None	4	1.8	--	--	4	3.8
Total	218	100	113	100	105	100

degree (36.9%).

In the total sample 40.4% had nine or more years of fashion merchandising experience (Table 2). The greatest number of educators fell into two categories: 3-4 years of experience (30.5%) and 9 or more years (27.6%). The business personnel tended to have more work experience than educators; 52.2% of this sample group had 9 or more years of experience. The business respondents in general had completed many years of work experience.

Respondents in the business sample held varied positions but the majority were in middle to upper management. A summary of this information on positions is presented in Table 3. The largest percentage of respondents held positions as store managers or owners and personnel directors.

A description of the fashion merchandising programs is presented in Table 4. Most programs were entitled "Fashion Merchandising." The length of programs varied from 9 to 36 months, with the majority (68%) having a length of 24 months. The sample of educators was composed of both administrators and instructors. The largest percentage (61%) consisted of instructors. There was a great variety in the length of teaching experience. The number of educators in each category was fairly similar; the 3-4 year category had a slightly higher percentage (23.8%). There were far more educators who had 1-8 years of experience than those having 9 or more years.

Table 3. Job titles of fashion merchandising business respondents

Job title	Number	Percentage
Manager trainee	1	0.9
Department manager	2	1.8
Assistant buyer	1	0.9
Buyer	5	4.4
Assistant store manager	3	2.6
Store manager or owner	41	36.3
Merchandise manager	15	13.2
Personnel director	33	29.2
President or vice president of store	8	7.1
Regional manager	1	0.9
Sales promotion/display director	2	1.8
Superintendent of operations	1	0.9
Total	113	100

Business establishments in the sample were categorized according to certain criteria. If the store employed 25 or more full-time employees, was departmentalized, and carried women's apparel and another major line such as men's wear or home furnishings, it was categorized as an independent department store or chain department store. All others were categorized as specialty stores. Of the total number of



Table 4. Description of fashion merchandising programs

Characteristic	Number	Percentage
<u>Title of program</u>		
Fashion merchandising	87	83.6
Marketing management	4	3.8
Retail merchandising/management	6	5.8
Apparel merchandising	1	1.0
Business department	2	1.9
Fashion and retail merchandising	2	1.9
Fashion careers	1	1.0
Home economics	1	1.0
Total	104	100
<u>Length of program</u>		
9 months	2	2.0
9 and 18 months	2	2.0
12 months	8	8.0
12 and 24 months	4	4.0
18 months	13	13.0
24 months	68	68.0
30 months	1	1.0
36 months	1	1.0
4 and 6 quarters	1	1.0
Total	100	100
<u>Respondent's position</u>		
Instructor	64	61.0
Chairperson	20	19.0
Coordinator/advisor	13	12.4
Associate professor	6	5.7
Professor	2	1.9
Total	105	100
<u>Teaching experience</u>		
Less than 1 year	11	10.5
1-2 years	16	15.2
3-4 years	25	23.8
5-6 years	15	14.3
7-8 years	16	15.2
9 or more years	22	21.0
Total	105	100

businesses, 40.5% were department stores, 43.1% were specialty stores, and 16.4% were chain department stores.

#### Competencies Judged Important for Entry and Midmanagement Positions

Responses of educators and business personnel were pooled and transformed to normalized ranks and mean scores were calculated in order to determine those competencies needed for entry and midmanagement positions. The cut-off point for acceptance was determined by examining the range and frequencies of scores and also the level of importance of the transformed score on the 1-11 certainty response scale. A cut-off point of .19 was established for both entry and midmanagement items. A normalized rank score of .19 is approximately equivalent to 6.5 on the certainty scale (6-"uncertain" and 11-"very important"). The transformed scores ranged from a -1.586 to 1.586. Entry level items were spread over the scale above this point but began to cluster in groups between .10 and -.35 (normalized ranks). The .19 score appeared to be a natural break in the range of scores and according to the certainty response scale was "somewhat important."

#### Entry level items

Mean scores for entry level items were extremely varied ranging from -.80 to 1.19 (Appendix L). There was consider-

able variation in response; the standard deviations ranged from .68 to 1.04. Only 16 competencies were judged to be important for entry level positions, or approximately 31% of all items on the questionnaire (Table 5).

The highest rated items pertained to human relations skills in working with other employees and selling skills with customers (Items 23, 39, and 42). Items pertaining to selecting merchandise to meet customers' needs and wants were also important (Items 4, 11, 28, 29, and 44). All of these skills would be used while dealing directly with customers. These competencies also relate to information gathering and decision-making which are necessary in planning merchandise assortments.

Previous studies (Ertel, 1967; Carmichael, 1968; Greenwood, 1972) had indicated that one of the main tasks of entry level personnel was direct contact with customers (selling). Findings in this study supported this supposition. Two of the highest rated competencies were working skillfully with customers and effectively initiating and closing sales. The other items pertaining to selecting merchandise would also be closely tied to this selling function.

Two competencies which were judged important dealt with promotional functions, planning window and interior displays (Item 1) and arranging floor space for merchandise sales

Table 5. Important competencies for entry level positions

Item No.	Item	Mean
1	Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.	.19
4	Identify the needs and wants of potential customers.	.78
7	Select specific merchandise which will satisfy the needs and wants of potential customers.	.30
11	Identify quality merchandise based on a technical knowledge of fabrics and garment construction.	.37
12	Evaluate themselves in terms of the personal qualities necessary to be successful in fashion merchandising.	.89
23	Work skillfully with customers.	1.19
28	Advise customers of flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.94
29	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	.80
36	Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.	.36
37	Determine current fashion trends and forecast future ones.	.20
39	Develop and maintain harmonious relationships with other employees.	1.16
42	Effectively initiate and close sales.	1.07
44	Evaluate the quality of construction features and materials used in accessory items.	.28

Table 5 (Continued)

Item No.	Item	Mean
45	Communicate effectively in writing memos, forms, reports, and business letters.	.55
47	Use terminology commonly accepted in the fashion and textiles industry to communicate product information and ideas.	.67
48	Perceive the importance of reading trade journals, newspapers, and other sources of trade information on a regular basis.	.82

(Item 36). Of the 16 items judged important for entry level, these two ranked relatively low, perhaps because some stores have personnel specially trained for these functions. In Greenwood's study (1972) one of the primary responsibilities of assistant buyers was to maintain the effective presentation of merchandise. Findings in this study also indicate that entry level persons do need the abilities to arrange merchandise for promotional purposes.

Respondents indicated that it was important for entry level persons to be able to evaluate themselves in terms of the personal qualities necessary to be successful in fashion merchandising (Item 12).

Written communication skills were rated important. It is necessary for entry level personnel to be competent in

writing memos, business letters and reports (Item 45). Also related to these written communication skills, respondents indicated that a perception of the importance of reading trade papers (Item 48) and a knowledge of terminology in the fashion and textiles industry (Item 47) are necessary. An awareness of current trends in the fashion industry was rated important (Item 37). This knowledge of current trends and terminology would facilitate communication with customers and other business personnel.

Greenwood (1972) found that two of the primary responsibilities of assistant buyers were to recommend actions to insure maximum sales and to transmit information to others. The competencies rated important in this study that pertain to identifying needs of customers and selecting merchandise for customers would facilitate this communication of information to others within the business. Frequent contact with customers would provide entry level persons with immediate information on customer needs.

#### Midmanagement level items

Mean scores for midmanagement items ranged from .75 to 1.44. The variation on midmanagement items was large but not as great as for entry level items; standard deviations ranged from .32 to .86 (Appendix M). All of the 51 items on the questionnaire were judged to be important by educators and

business personnel. The same cut-off point was used for midmanagement items; all had mean scores above .19.

The items rated the least important within the whole set of midmanagement competencies, with means between .75 and .91, are presented in Table 6. The tasks involved with planning window and interior displays and coordinating fashion shows (Items 1 and 13) may be handled by specialized persons in some stores and thus result in the lower ratings. Three of the items (10, 18, 22) were related to a general sociological, psychological, and economic background in textiles and clothing. Perhaps they were perceived as being less important because they were less tangible than competencies pertaining to planning and controlling merchandise. Advising customers on flattering garment styles (Item 28) is a competency involved with direct customer selling and thus might be less important for midmanagement personnel. Entry and midmanagement personnel may have different types of interaction with customers. The fact that department stores handle more than apparel items may also have caused business respondents to place less importance on this area of advising. Knowledge of the types and functions of resident buying offices (Item 38) may not be as important because the business contacts for a particular store could be established. Thus buyers use preset vendor or buying office contacts.

The most important items in the midmanagement set, with

Table 6. Midmanagement items with lowest mean scores

Item No.	Item	Mean
1	Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.	.88
10	Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	.90
13	Plan and coordinate fashion shows and special events.	.75
18	Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	.82
22	Explain the various theories of fashion adoption and their implications for merchandising.	.78
28	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.91
38	Explain the types and functions of resident buying offices.	.88

means between 1.35 and 1.44 are presented in Table 7. A great number of these items were involved with the process of buying and controlling merchandise, a major function of midmanagement personnel (Items 4, 6, 7, 9, 41). Along with selection of appropriate merchandise and being able to understand reporting systems, a good understanding of factors which influence



Table 7. Midmanagement items with highest mean scores

Item No.	Item	Mean
4	Identify the needs and wants of potential customers.	1.44
5	Identify and analyze factors which influence the profitable pricing of merchandise.	1.35
6	Use daily, weekly, or monthly stock and sales reports to evaluate past performance, appraise current plans, and make future plans.	1.44
7	Select specific merchandise which will satisfy the needs and wants of potential customers.	1.41
9	Plan a balanced merchandise assortment.	1.35
31	Assign duties and delegate responsibility to maintain an efficient department or store operation.	1.42
32	Analyze the reasons for markdowns.	1.40
36	Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.	1.35
39	Develop and maintain harmonious relationships with other employees.	1.43
41	Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.	1.35

pricing is also important (Items 5 and 32). Another important competency area is supervision of personnel (Items 31 and 39). Midmanagers have the responsibility of coordinating the activities of sales personnel. They need the competency to arrange merchandise within their individual department or divisions (Item 36), whereas skills in window and interior displays are less essential (Item 1), an item which was in the group of lesser importance.

According to prior studies (Carmichael, 1968; Greenwood, 1972), the tasks and responsibilities required of midmanagement persons were different from those at entry level. Thus different competencies and probably a greater number of competencies would be required at the midmanagement level as opposed to the entry level. Findings in this study supported their conclusions.

#### Variability in Response on Entry and Midmanagement Competencies

The variation in response on entry and midmanagement items was examined through the use of a scattergram. Responses of educators and business personnel were pooled and transformed to normalized ranks; scores were plotted (Figure 2).

As stated previously there was great variation in response on the importance of entry level items; the range of

scores was more restricted for midmanagement items but scores were higher. There was a group of 16 items that was considered important for both levels; those with scores of .19 and above (Table 5 in the previous section).

The first hypothesis tested was that there was no significant difference between the level of importance on midmanagement and entry level items. The scattergram shows the great variation in response on entry level items as opposed to midmanagement items. Therefore, the first hypothesis was rejected. Different competencies were needed at the midmanagement level as opposed to entry level. There was some overlap between items judged important at the two levels, but overall all items were judged important at the midmanagement level. Since all competencies were rated as important for midmanagement personnel and only certain ones for the entry level position, it may be that those competencies are best learned on the job. This does not rule out inclusion of these competencies in curriculum planning but it does indicate where emphasis should be placed in training people for entry level positions. The knowledge gained pertinent to midmanagement level competencies may also be of value in the long run.

There were three items where the ratings were very close (Table 8). These findings indicate that it is equally important in an absolute sense for entry and midmanagement personnel to be able to relate to customers, but in a relative

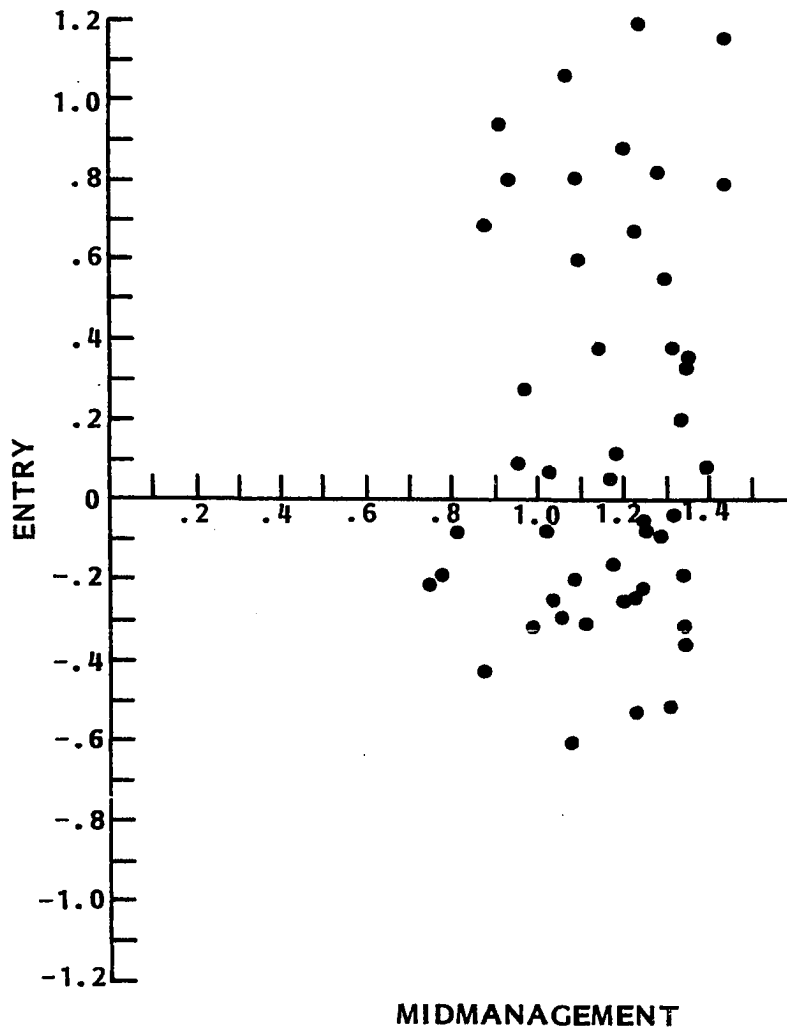


Figure 2. Variability in response on entry and midmanagement items

Table 8. Entry and midmanagement items with similar means

Item No.	Item	Ratings	
		Entry	Midman.
23	Work skillfully with customers.	1.19	1.23
28	Advise customers of flattering garment styles.	.94	.91
42	Effectively initiate and close sales.	1.07	1.06

sense it is more important for entry level personnel to be able to perform this function.

Findings on the important competencies for both levels indicated that entry level personnel need the competencies to deal with customers and assist in selecting merchandise appropriate for customers. It is also important for mid-management personnel to possess these competencies, but many other competencies are more important, including those related to selecting, evaluating, and controlling inventory as well as supervising personnel.

### Variability in Response Between Educators and Business Personnel

The variability in response between educators and business personnel was examined for both entry and midmanagement level competencies. Responses were transformed to normalized ranks and plotted on scattergrams.

#### Variability on entry competencies

Mean scores for entry level competencies were plotted in a scattergram (Figure 3). There was considerable agreement between the two groups, but educators in general rated the competencies more important. Most of the points fell to the left of the line of equality, indicating higher mean scores by educators. Of the items judged important for entry level merchandising personnel there were no items which appeared discrepant from the response pattern.

The second hypothesis tested in this study was that there was no significant difference in response between educators and business personnel on entry level competencies. This hypothesis was not rejected for entry level items even though educators did have a response set to rate competencies higher than business personnel. This set could be a result of the role they are assuming as educators; in other words, if the same respondents were placed in a business setting, s/he might respond with a lower rating. The response may be an

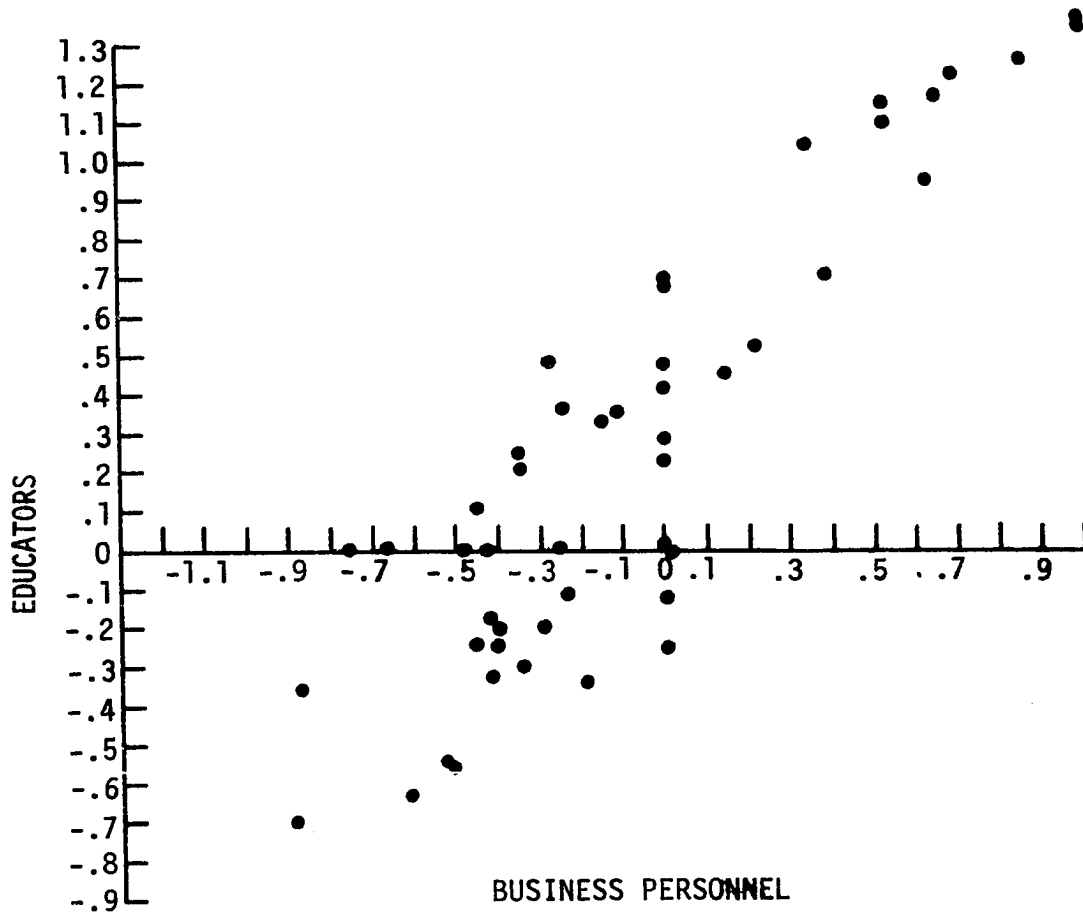


Figure 3. Variability on entry items between educators and business personnel

artifact of the role or situation and there may be no real difference in the perception of importance of competencies.

#### Variability on midmanagement competencies

The scattergram displaying mean scores for midmanagement competencies is presented in Figure 4. Overall, educators and business personnel agreed. All responses fell to the left of the line of equality indicating that educators rated competencies slightly higher (more important) than did business personnel.

The third hypothesis tested in this study was that there was no significant difference in response between educators and business personnel on midmanagement competencies. This hypothesis was not rejected for midmanagement items even though educators did have a response set to rate competencies higher than business personnel.

One item appeared to be discrepant from the overall trend of response. Item 1,<sup>1</sup> plan attractive window and interior displays, was located to the right of the pattern of response; educators and business personnel were in agreement on this item, with ratings of .89 and .87 respectively. This was the item rated least important by educators, but there were approximately 30% of the items rated lower by business personnel.

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<sup>1</sup>Outliers are represented as open circles in scattergrams.



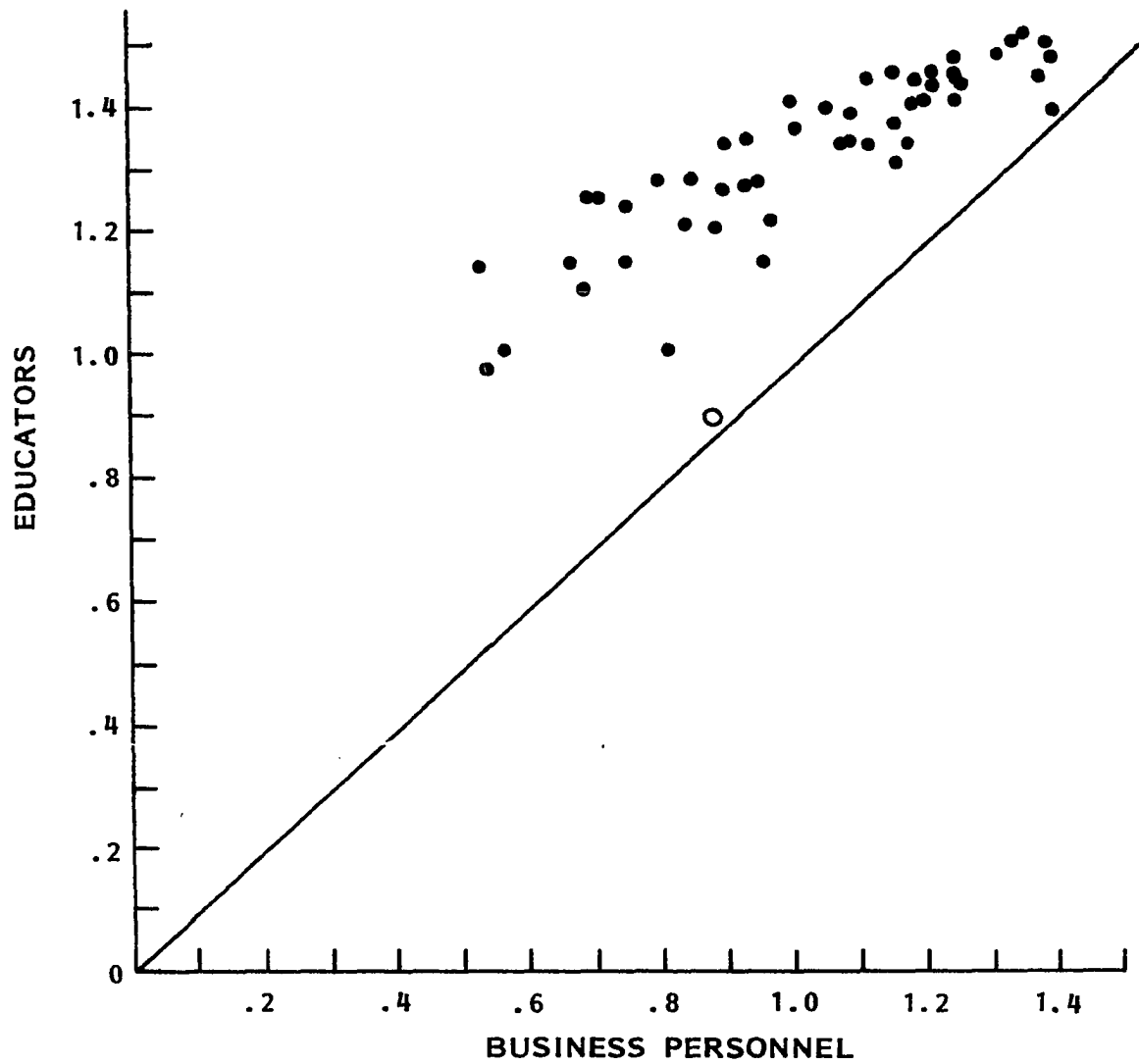


Figure 4. Variability on midmanagement items between educators and business personnel

Business personnel may see this as a more relevant skill from their perspective, in other words, more useful on a day-to-day basis.

### Derivation of Factors

Data from entry and midmanagement items were factor analyzed separately using the method of principal components with the largest correlation in the row inserted in the diagonal. Criteria for selecting items differed in the two analyses because each set of data is unique and requires independent inspection. The factor analyses for entry and midmanagement items are discussed separately.

#### Entry level factors

Through the factor analysis four factors were derived from the 51 items which accounted for the clustering of 24 items. Some of the remaining items did not load heavily on any of the factors. Other items did not fall discretely into one of the four factors, thus item content as well as the extent to which an item loaded on several factors was considered. An item was not selected for one factor, even when it loaded heavily, if it was also loading heavily on another factor. Items with factor loadings of .54 or higher and .20 above the next highest one were examined. The name assigned to each factor attempted to typify the concept which seems to pervade the content of the items loading on it. The names of

the four factors for entry level items were as follows:

Factor 1: Merchandise planning and control

Factor 2: Working relations with customers

Factor 3: Personnel management

Factor 4: Theories and technical aspects of textiles  
and clothing

The percent of variance removed after rotation of each of the four factors was: Factor 1 - 18.0%, Factor 2 - 13.9%, Factor 3 - 10.4%, and Factor 4 - 9.8%. These four factors explained 52% of the total variance.

An estimate of reliability was calculated for each factor using a formula which derives a coefficient for construct reliability; the reliability with which a group of items measures a particular factor, controlling for the extent to which these same items measure other factors. This is the reliability with which the scale for all items in a factor measures its intended purpose. The formula used for calculating the reliability of each factor was:

$$\frac{n(\bar{a}^2)}{1 + (n-1)\bar{a}^2} \quad ^1$$

The overall reliability for all items in a particular factor was estimated using the following formula:

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<sup>1</sup> The n is the total number of items in the factor and  $\bar{a}$  is the average factor loading.

Table 9. Estimates of reliability for entry level factors

Factor	Estimate of Reliability	
	Construct Reliability	Overall Reliability
1	.91	.91
2	.96	.89
3	.80	.85
4	.75	.81

$$\frac{n\bar{r}}{1 + (n-1)\bar{r}}$$

The reliability coefficients for construct reliability and for the overall reliability are presented in Table 9.

The resulting factors are presented in the following discussion and Tables 10 through 13, which include item number, item, and factor loading.

The eight items that composed Factor 1 involved managerial competencies pertaining to merchandise planning and control. The items with the highest factor loadings were: planning a balanced merchandise assortment and developing a

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<sup>1</sup>The n is the total number of items in the factor and  $\bar{r}$  is the average item intercorrelation of items in factor.

seasonal merchandise budget (Items 9 and 15 respectively). Three items (6, 8, 41) pertained to using business reports to control inventory and adjust plans. Decisions involved with pricing and profitability pervaded the content of Items 5, 24, and 33.

Table 10. Factor 1--entry level: Merchandise planning and control

Item No.	Item	Factor Loading
5	Identify and analyze factors which influence the profitable pricing of merchandise.	.74
6	Use daily, weekly, or monthly stock and sales reports to evaluate past performance, appraise current plans, and make future plans.	.73
8	Adjust a merchandise assortment plan according to supply and demand.	.77
9	Plan a balanced merchandise assortment.	.81
15	Develop a seasonal merchandise budget based on past and anticipated sales.	.79
24	Select merchandise items for retail advertising based on profit and sales potential, available inventory, customer appeal, and the store's image.	.71
33	Explain the provisions of purchase orders which include terms of sale and delivery.	.67
41	Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.	.68

Table 11. Factor 2--entry level: Working relations with customers

Item No.	Item	Factor Loading
4	Identify the needs and wants of potential customers.	.67
23	Work skillfully with customers.	.81
28	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.77
29	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	.78
42	Effectively initiate and close sales.	.78
47	Use terminology commonly accepted in the fashion and textiles industry to communicate product information and ideas.	.60
48	Perceive the importance of reading trade journals, newspapers, and other sources of trade information on a regular basis.	.59

The competencies needed in working relations with customers composed Factor 2. Items with the highest loadings included: working skillfully with customers (23) and effectively initiating and closing sales (42). The other competencies involved knowledge which would be beneficial in assisting customers: fashion terminology, attractive garment styles, fabric performance characteristics, and preferences

of customers. The competency with the lowest loading (.59) involved a perception of the importance of reading current fashion periodicals. For merchandising personnel fashion periodicals provide the most current information about fashion trends and terminology, which is helpful in advising customers.

The content of Factor 3 involved personnel management. The items were intuitively cohesive involving skills in developing and carrying out training for employees and delegating responsibilities to subordinates (Table 12).

The fourth factor pertained to theories and technical aspects in the study of textiles and clothing. The item

Table 12. Factor 3--entry level: Personnel management

Item No.	Item	Factor Loading
31	Assign duties and delegate responsibility to maintain an efficient department or store operation.	.71
34	Develop training programs for new employees.	.65
49	Carry out existing training programs for new employees.	.75
51	Assign employees to tasks which are appropriate to the interests and skills of the individuals.	.74

Table 13. Factor 4--entry level: Theories and technical aspects of textiles and clothing

Item No.	Item	Factor Loading
10	Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	.54
18	Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	.73
22	Explain the various theories of fashion adoption and their implications for merchandising.	.61
27	Interpret legislation regarding fabric and garment labeling as it affects store policy and procedure.	.62
44	Evaluate the quality of construction features and materials used in accessory items.	.59

with the highest loading involved factors which influence the changing pattern of fashion. Closely related to this item was the competency pertaining to explanation of fashion adoption theories. The other items involved a general background in textiles and clothing which would be helpful in making buying decisions (Table 13).



Midmanagement factors

Nine factors were derived for midmanagement level from the 51 items, which accounted for the clustering of 38 items. Some items did not load heavily on any of the factors. When an item loaded .4 or above on one factor but also .3 or above on one or more other factors, the content was examined to determine where it would best be placed intuitively. Three items loaded .39 or higher on two factors and made intuitive sense with both factors. The three items (7, 30, 35) were placed in two different factors, but were not scored or used for further analysis. Several other items loaded .39 or higher on one factor and .30 or higher on another. These items were retained because they were congruent with the overall content of the factor. However, they were not scored. Items which made intuitive sense and which had a factor loading of .50 or greater and .20 above the next highest loading were scored. The names of the nine factors for midmanagement level items were as follows:

Factor 1: Working relations with customers

Factor 2: Budgeting and profitable pricing

Factor 3: Personnel management

Factor 4: Theories and technical aspects of textiles  
and clothing

Factor 5: External influences on store planning and  
operation

Factor 6: Development and control of merchandise assortment plans

Factor 7: Determination of merchandise desired by customers

Factor 8: Development and adjustment of store plans

Factor 9: Understanding of the fashion and retail industry

The percentage of variance removed after rotating each of the nine factors was: Factor 1 - 8.36%, Factor 2 - 11.54%, Factor 3 - 6.51%, Factor 4 - 9.22%, Factor 5 - 5.02%, Factor 6 - 3.89%, Factor 7 - 4.48%, Factor 8 - 4.65%, and Factor 9 - 3.21%. These nine factors explained 56.88% of the total variance.

Estimates of construct reliability and overall reliability were calculated for each factor (Table 14). In all cases the overall reliability was higher than the construct reliability. For some factors this resulted because items were loading heavily on more than one factor thus reducing the reliability with which the group of items measures the particular factor. These items were included even though the reliability was lowered, because they made intuitive sense and could be used for curriculum development purposes.

The nine factors are presented in the following discussion and Tables 15 through 23, which include item number, item, and factor loading.

Table 14. Estimates of reliability for midmanagement factors

Factor	Estimates of Reliability	
	Construct Reliability	Overall Reliability
1	.84	.85
2	.84	.97
3	.74	.91
4	.80	.95
5	.64	.82
6	.71	.82
7	.46	.71
8	.48	.79
9	.48	.88

Table 15. Factor 1--midmanagement level: Working relations with customers

Item No.	Item	Factor Loading
23	Work skillfully with customers.	.74
28	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.80
29	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	.76
42	Effectively initiate and close sales.	.71

The four competencies in Factor 1 pertained to working relations with customers. The item with the highest factor loading (28) was advising customers on flattering garment styles. The next highest was identifying fabric performance characteristics desired by consumers (29). Two items pertained to knowledge that merchandising personnel would use in working with customers and in initiating and closing sales (Items 23 and 42).

The managerial skills involved with budgeting and profitable pricing were included in Factor 2. The competency pertaining to developing a seasonal merchandise budget had one of the highest loadings (15). Other competencies supporting this general theme of developing a budget included calculating prices, analyzing reasons for markdowns, explaining provisions of purchase orders, analyzing factors that influence profitable pricing, and perceiving the importance of assortment and financial planning. Three competencies pertained to advertising and the resulting cost and effectiveness (Items 2, 17, 24). The item pertaining to evaluating advertising copy (2) was not explicitly related to profitability, but the skills would be needed to ultimately evaluate advertisements in terms of profitability. Item 30 had a low factor loading and was loading on another factor but was intuitively linked with Factor 2. This item is designated with a superscript indicating that it was not scored or used for further analysis. Items in

Table 16. Factor 2--midmanagement level: Budgeting and profitable pricing

Item No.	Item	Factor Loading
2	Evaluate advertising copy according to established principles of advertising.	.54
5	Identify and analyze factors which influence the profitable pricing of merchandise.	.61
15	Develop a seasonal merchandise budget based on past and anticipated sales.	.73
16	Perform calculations needed to price merchandise.	.67
17	Judge the relative cost and effectiveness of an advertisement or display.	.50
24	Select merchandise items for retail advertising based on profit and sales potential, available inventory, customer appeal, and the store's image.	.74
30 <sup>a</sup>	Perceive the importance of planning activities such as merchandise assortment planning and financial planning.	.43
32	Analyze the reasons for markdowns.	.50
33	Explain the provisions of purchase orders which include terms of sale and delivery.	.66

<sup>a</sup>This item was not scored or used for further analysis.

Table 17. Factor 3--midmanagement level: Personnel management

Item No.	Item	Factor Loading
3 <sup>a</sup>	Interpret legislation regarding wages and hours, workman's compensation, and unemployment benefits as it affects store policy and procedure.	.43
34	Develop training programs for new employees.	.79
46 <sup>a</sup>	Coordinate all promotion including displays, advertising, and personal selling efforts.	.43
49	Carry out existing training programs for new employees.	.74
51	Assign employees to tasks which are appropriate to the interests and skills of the individuals.	.60

<sup>a</sup>This item was not scored or used for further analysis.

the following seven tables will be designated likewise.

The content of Factor 3 involved personnel management. Items with the highest loadings were developing and carrying out training programs. Other functions related to these personnel tasks were coordinating promotional activities and assigning employees to tasks. Item 3 had the lowest loading but included knowledge that would be helpful in supervising personnel (Table 17).

Table 18. Factor 4--midmanagement level: Theories and technical aspects of textiles and clothing

Item No.	Item	Factor Loading
10	Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	.71
11	Identify quality merchandise based on a technical knowledge of fabrics and garment construction.	.67
18	Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	.68
22	Explain the various theories of fashion adoption and their implications for merchandising.	.70
35 <sup>a</sup>	Explain the organization of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution.	.52
43 <sup>a</sup>	Interpret the effects of price and personal income on the purchasing behavior of consumers.	.42
44 <sup>a</sup>	Evaluate the quality of construction features and materials used in accessory items.	.50

<sup>a</sup>This item was not scored or used for further analysis.

Factor 4 pertained to theories and technical aspects in the study of textiles and clothing. Items 10, 18, and 22 had the highest loadings and pertained to the sociological and

Table 19. Factor 5--midmanagement level: External influence on store planning and operation

Item No.	Item	Factor Loading
21	Interpret legislation pertaining to customer and product liability as it affects store policy and procedure.	.68
26 <sup>a</sup>	Recognize the effects of community events and local business activities on store plans.	.46
27	Interpret legislation regarding fabric and garment labeling as it affects store policy and procedure.	.69

<sup>a</sup>This item was not scored or used for further analysis.

psychological aspects of textiles and clothing, fashion adoption being a part of this area of study. Other items involved a general background in textiles and clothing (Table 18).

Competencies pertaining to external influences on store planning and operation composed Factor 5. These external influences included legislation, community events, and local business activities.

The content of Factor 6 involved the managerial skills involved with merchandise assortment planning. Items 8 and 9 had very high loadings, both .80. The competency pertaining to selection of merchandise did not have a high loading in comparison to Items 8 and 9, but it would be a closely



Table 20. Factor 6--midmanagement level: Development and control of merchandise assortment plans

Item No.	Item	Factor Loading
7 <sup>a</sup>	Select specific merchandise which will satisfy the needs and wants of potential customers.	.41
8	Adjust a merchandise assortment plan according to supply and demand.	.80
9	Plan a balanced merchandise assortment.	.80

<sup>a</sup>This item was not scored or used for further analysis.

Table 21. Factor 7--midmanagement level: Determination of merchandise desired by customers

Item No.	Item	Factor Loading
4 <sup>a</sup>	Identify the needs and wants of potential customers.	.45
7 <sup>a</sup>	Select specific merchandise which will satisfy the needs and wants of potential customers.	.41
37	Determine current fashion trends and forecast future ones.	.54

<sup>a</sup>This item was not scored or used for further analysis.

related activity to planning (Table 20).

The conceptual theme of Factor 7 evolved around the identification of merchandise currently desired by customers. These items did not have high loadings but were intuitively cohesive (Table 21).

Factor 8 involved the development and adjustment of store plans. Items 14 and 41 involved the development of stock control and financial plans. Item 45 pertained to skills needed to communicate plans and record information necessary in the development of plans. This was not a strong factor because Items 14, 30, and 41 loaded on factors other than this one.

Table 22. Factor 8--midmanagement level: Development and adjustment of store plans

Item No.	Item	Factor Loading
14 <sup>a</sup>	Develop plans to prevent or reduce stock shrinkage.	.42
30 <sup>a</sup>	Perceive the importance of planning activities such as merchandise assortment planning and financial planning.	.40
41 <sup>a</sup>	Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.	.44
45	Communicate effectively in writing memos, forms, reports, and business letters.	.52

<sup>a</sup>This item was not scored or used for further analysis.

Table 23. Factor 9--midmanagement level: Understanding the fashion and retail industry

Item No.	Item	Factor Loading
19 <sup>a</sup>	Describe a total retail operation according to functions or areas of responsibility including finance and control, merchandising, sales promotion, and operations.	.42
35 <sup>a</sup>	Explain the organization of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution.	.42
38 <sup>a</sup>	Explain the types and functions of resident buying offices.	.47

<sup>a</sup>This item was not scored or used for further analysis.

Factor 9 pertained to an understanding of the fashion and retail industry. The factor loadings were low but the factor exists intuitively. All items involved a functional knowledge of industry operation.

#### Relationships of Demographic Variables and Entry Level Factors

Demographic variables of educators and business personnel were correlated with the four factors. Relationships within each group of respondents are discussed separately.

Variables which had correlation coefficients significant at the  $p < .01$  and  $.05$  level are discussed.

#### Demographic variables of business personnel

The following demographic variables associated with business personnel were correlated with the factor scores: 1) geographical region, 2) years of educational preparation, 3) age of respondent, 4) sex of respondent, 5) years of merchandising experience, and 6) position within the store. Variables which correlated significantly with some of the factors were sex and years of educational preparation. A correlation matrix of the demographic variables and factor scores is presented in Table 24.

Sex of the respondent was positively correlated with Factor 2, working relationship with customers, with a correlation coefficient of  $.317$  (significant at  $p < .01$ ). Females responded higher on these items, indicating that females placed more importance on the selling and advising roles with customers. The years of educational preparation were negatively correlated with Factor 2, with a correlation coefficient of  $-.234$  (significant at  $p < .05$ ). As business personnel attain higher levels of education they seem to place less importance on dealing with customers.

Table 24. Correlations of demographic variables for business personnel with factors for entry level

Factors	Background Variables <sup>a</sup>					
	A	B	C	D	E	F
1	.051	.134	-.032	-.092	-.093	-.094
2	.096	-.234*	-.043	.317**	-.076	-.045
3	-.029	.009	.030	-.005	-.072	-.015
4	.158	-.127	-.066	.202	-.097	-.061

<sup>a</sup>A, geographical region; B, years of educational preparation; C, age of respondent; D, sex of respondent; E, years of merchandising experience; F, position within the store.

\*  
p < .01.

\*\*  
p < .05.

#### Demographic variables of educators

Factor scores on entry level competencies were not significantly correlated with the following variables associated with the educators: 1) geographical region, 2) years of educational preparation, 3) age of respondent, 4) sex of respondent, 5) years of merchandising experience, and 6) years of teaching experience.

The fourth hypothesis tested was that there will be no significant relationship on judged competencies by region,

years of educational preparation, age, sex, years of merchandising experience, position, or years of teaching experience. For business personnel this hypothesis was rejected for years of educational preparation and sex and accepted for region, age, years of merchandising experience, and position. For educators the hypothesis was not rejected for any of the variables.

#### Relationships of Demographic Variables and Midmanagement Level Factors

Demographic variables of educators and business personnel were correlated with Factors 1 through 6 for midmanagement. Factors 7, 8, and 9 were not used in the correlation analysis because most of the items in those factors were not scored. Variables which had correlation coefficients significant at the  $p < .01$  or  $.05$  level are discussed.

#### Demographic variables of business personnel

The six factors were correlated with the following variables associated with business personnel: 1) geographical region, 2) educational preparation, 3) age, 4) sex, 5) years of merchandising experience, and 6) position with the store. Variables which correlated with some of the factors were years of educational preparation and sex of respondent. A correlation matrix of the demographic variables is presented

Table 25. Correlations of demographic variables for business personnel with factors for midmanagement level

Factor	Background Variables <sup>a</sup>					
	A	B	C	D	E	F
1	.003	.207*	.125	-.094	-.070	-.068
2	.052	.077	-.138	-.001	-.127	.061
3	-.016	.138	.024	-.018	.044	-.083
4	.097	-.164	.027	.147	-.108	.062
5	.027	.154	-.017	-.200*	.039	-.096
6	.179	.190*	-.076	-.014	-.025	-.033

<sup>a</sup>A, geographical region; B, years of educational preparation; C, age of respondent; D, sex of respondent; E, years of merchandising experience; F, position within the store.

\*  $\underline{p} < .05$ .

in Table 25.

Level of education was positively correlated with Factor 1 (working relations with customers) with a correlation coefficient of .207 ( $\underline{p} < .05$ ) and with Factor 6 (development and control of merchandise assortment plans) with a correlation coefficient of .190 ( $\underline{p} < .05$ ). As business personnel achieved higher levels of education they placed more importance on skills directly related to working with customers

and on management of merchandise assortment plans. The relationship between educational preparation and this factor pertaining to working relations with customers was not the same for the entry and midmanagement factor analyses. The relationship was negative for entry level and positive for midmanagement. The factors, however, did not contain the same items, but did convey the same conceptual meaning. Sex of the respondent was positively correlated with Factor 5, external influences on store planning and operation, with a correlation of  $-.200$  ( $p < .05$ ). Females in business placed more importance on the knowledge of external influences such as legislation and the local business economy.

#### Demographic variables of educators

Midmanagement factors (1-6) were correlated with the following variables associated with educators: 1) geographical region, 2) educational preparation, 3) age, 4) sex, 5) years of merchandising experience, and 6) years of teaching experience. Variables which correlated significantly with some of the factors were region and age. A correlation matrix of the demographic variables and factor scores is presented in Table 26.

Geographical region of the respondents was negatively correlated with Factor 2 (budgeting and profitable pricing) with a correlation coefficient of  $-.209$  ( $p < .05$ ) and



Table 26. Correlations of demographic variables for educators with factors for midmanagement level

Factors	Background Variables <sup>a</sup>					
	A	B	C	D	E	F
1	-.123	-.092	.030	-.033	-.017	-.082
2	-.209*	.069	.061	.126	.005	.067
3	.183	-.124	-.007	-.029	.186	-.164
4	-.132	.135	.043	-.064	-.050	.133
5	.120	-.060	.056	-.119	.048	-.015
6	-.195*	.009	.208*	.001	.075	.191

<sup>a</sup>A, geographical region; B, years of educational preparation; C, age of respondent; D, sex of respondent; E, years of merchandising experience; F, years of teaching experience.

\*  $\underline{p} < .05$ .

with Factor 6 (development and control of merchandising assortment plans) with a correlation of  $-.195$  ( $\underline{p} < .05$ ). No logical explanation was derived for these relationships. Age of the respondents was positively correlated with Factor 6 (development and control of merchandise assortment plans) with a correlation coefficient of  $.208$  ( $\underline{p} < .05$ ). With increasing age educators placed more importance on the management of merchandise assortment plans.

The fifth hypothesis tested was that there will be no significant relationship on judged midmanagement level competencies by: region, years of educational preparation, age, sex, years of merchandising experience, position or years of teaching experience. For business personnel this hypothesis was rejected for educational preparation and sex of respondent and not rejected for region, age, years of merchandising experience, and position. For educators this hypothesis was rejected for geographical region and age and was not rejected for years of educational preparation, sex of respondent, years of merchandising experience, and years of teaching experience.

#### Variability in Response Among Three Types of Business Respondents

Business respondents were categorized by type of store; independent department stores, specialty stores, and chain department stores. Responses were transformed to normalized ranks and mean scores calculated. Scattergrams were made for entry and midmanagement items for each possible combination of store types; a total of six scattergrams were made. Outliers, items for which one group responded disproportionately higher or lower, were examined and discussed. Outliers are represented in the scattergrams as open circles. Only items judged important were examined for outliers. Each scattergram is

discussed separately and general discussion is presented at the end of this section.

Variability in response on entry items between independent department and specialty stores

A majority of the entry level items were rated more important by the specialty store respondents than by the independent department store respondents. These items fell to the right of the line of equality (Figure 5). Only two items judged important for entry level personnel appeared to be discrepant<sup>1</sup> from the pattern of response (Table 27).

Department store respondents indicated that written communication skills were more important (Item 45). These entry level personnel may have more responsibilities for maintaining records and communicating with other business representatives. In Greenwood's study (1972) a majority of assistant buyers in department stores indicated that the following were their primary responsibilities: maintain proper procedures for orders, direct transfer of merchandise between stores, and transmit merchandise information to others. These tasks would involve some form of written communication. The discrepancy on Item 29 may have been a result of the type of merchandise carried in the two store types, specialty stores

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<sup>1</sup>Outliers are represented as open circles in scattergrams.

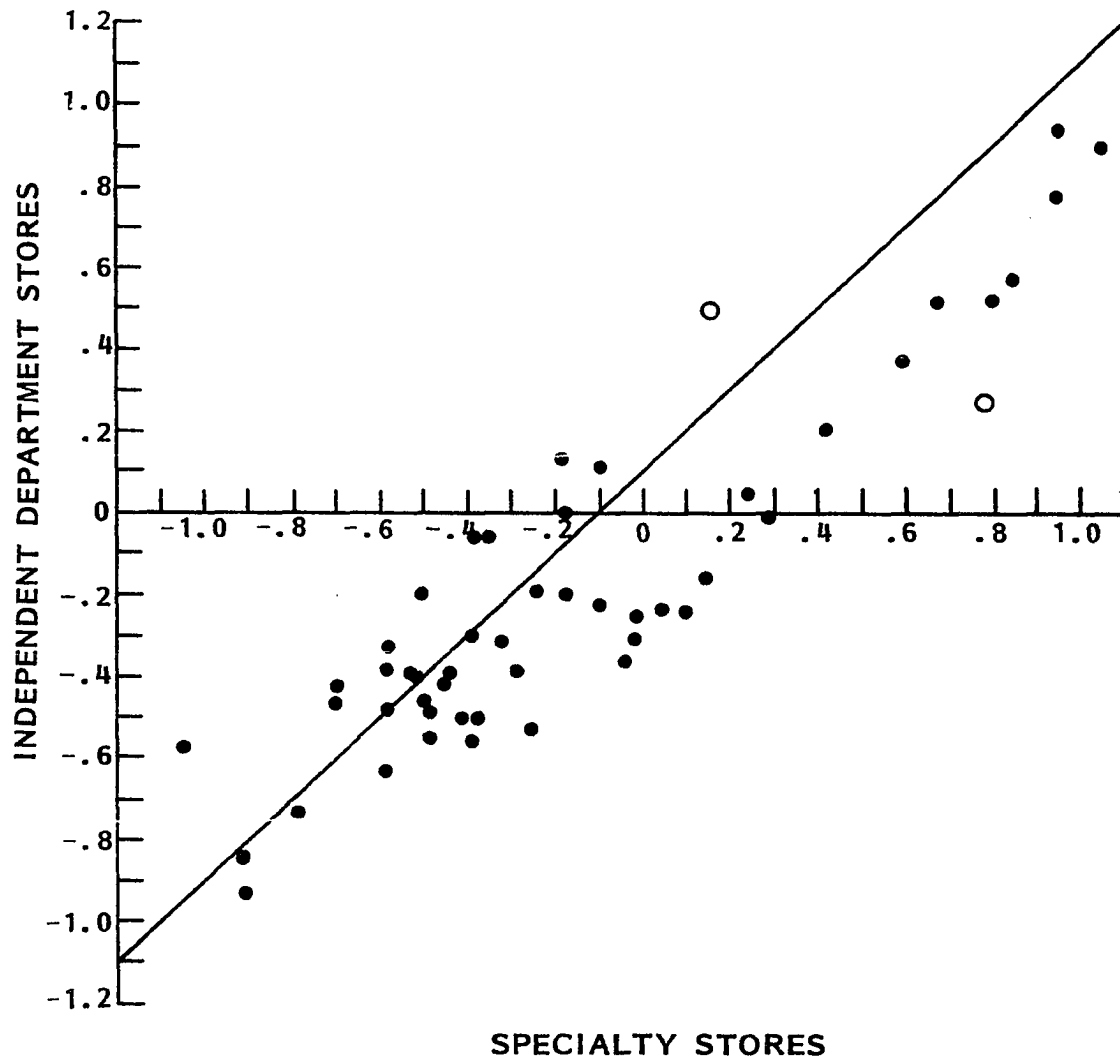


Figure 5. Variability in response on entry items between independent department and specialty stores

Table 27. Discrepancy on entry items between independent department and specialty stores

Item No.	Item	Ratings	
		Independent Department	Specialty
29	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	.28	.88
45	Communicate effectively in writing memos, forms, reports, and business letters.	.50	.25

carrying a limited line of merchandise and chain department stores carrying a multiple line. It may not be as important for midmanagers in chain department stores to possess knowledge of fabric characteristics, because apparel is only one line in the store.

Variability in response on entry items between specialty and chain department stores

Respondents in specialty and chain department stores agreed to a great extent on the importance of entry level competencies. Items clustered along the line of equality (Figure 6). Of the items judged important for entry level, three appeared to be discrepant from the pattern of response (Table 28). These items all pertained to satisfying the

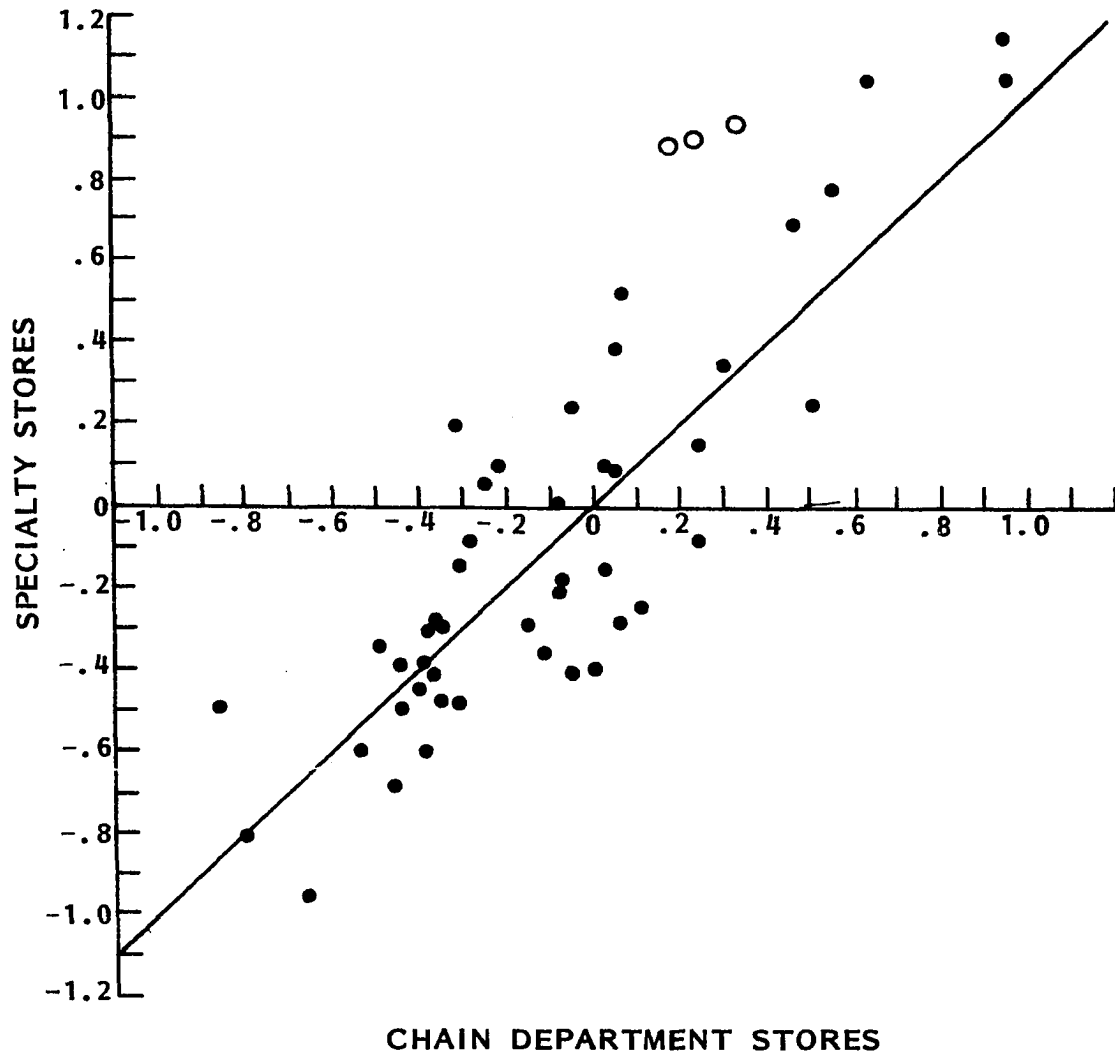


Figure 6. Variability in response on entry items between specialty and chain department stores

Table 28. Discrepancy on entry items between specialty and chain department stores

Item No.	Item	Ratings	
		Specialty	Chain Department
4	Identify the needs and wants of potential customers.	.90	.22
28	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.93	.32
29	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	.88	.18

needs of customers. Items 28 and 29 pertained specifically to apparel and items made of textile materials. Because chain department stores handle merchandise other than apparel these respondents may not place as much importance on this knowledge. No logical explanation could be found for the discrepancy on Item 4.

Variability in response on entry items between independent and chain department stores

In general, respondents in chain department stores rated items slightly higher than independent department store respondents. More items were to the right of the line of

Figure 7. Variability in response on entry items between independent and chain department stores



equality than to the left (Figure 7). Of the items judged important none were discrepant from the pattern of response.

Variability in response on midmanagement items between independent department and specialty stores

Respondents from specialty stores rated a majority of the items higher than did independent department store respondents. Most items fell to the right of the line of equality (Figure 8). There were several items which appeared to be discrepant from the pattern of response (Table 29).

Respondents in specialty stores placed more importance on the knowledge of personnel management (Items 3 and 34). Within department stores personnel training may be more of a centralized function. From personal observation the researcher notes that a specialty store manager usually has the responsibility for hiring and training sales personnel; thus these competencies would be more important.

Specialty store respondents placed more importance on competencies pertaining to promotion (Items 13 and 40). A midmanager needs the skills to develop displays and coordinate fashion shows. In department stores there may be specialized personnel assigned to these duties. The competency pertaining to window and interior displays (Item 1) was not discrepant from the general response pattern, but it was

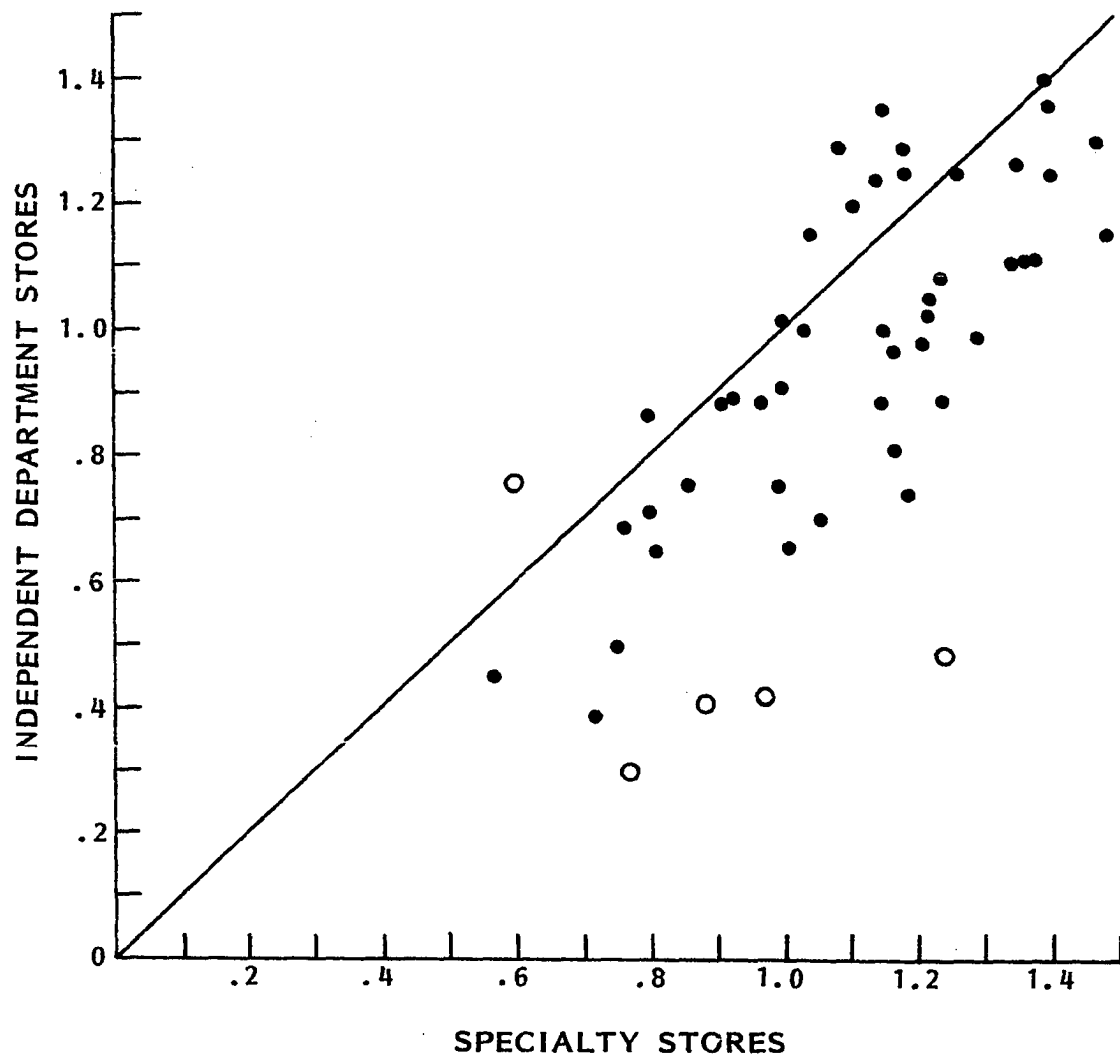


Figure 8. Variability in response on midmanagement items between independent department and specialty stores

Table 29. Discrepancy on midmanagement items between independent department and specialty stores

Item No..	Item	Ratings	
		Independent Department	Specialty
3	Interpret legislation regarding wages and hours, workman's compensation and unemployment benefits as it affects store policy and procedure.	.43	.97
13	Plan and coordinate fashion shows and special events.	.30	.77
34	Develop training programs for new employees.	.48	1.24
40	Apply the elements and principles of design to the selection and promotion of merchandise.	.41	.88

rated higher by respondents in specialty stores than by respondents in department stores, 1.06 and .70 respectively.

Variability in response on midmanagement items between specialty and chain department stores

In general, respondents in specialty and chain department stores agreed on the importance of midmanagement competencies. Most items fell along the line of equality, with the groups exhibiting a similar response set (Figure 9). The competencies needed for midmanagement positions in both

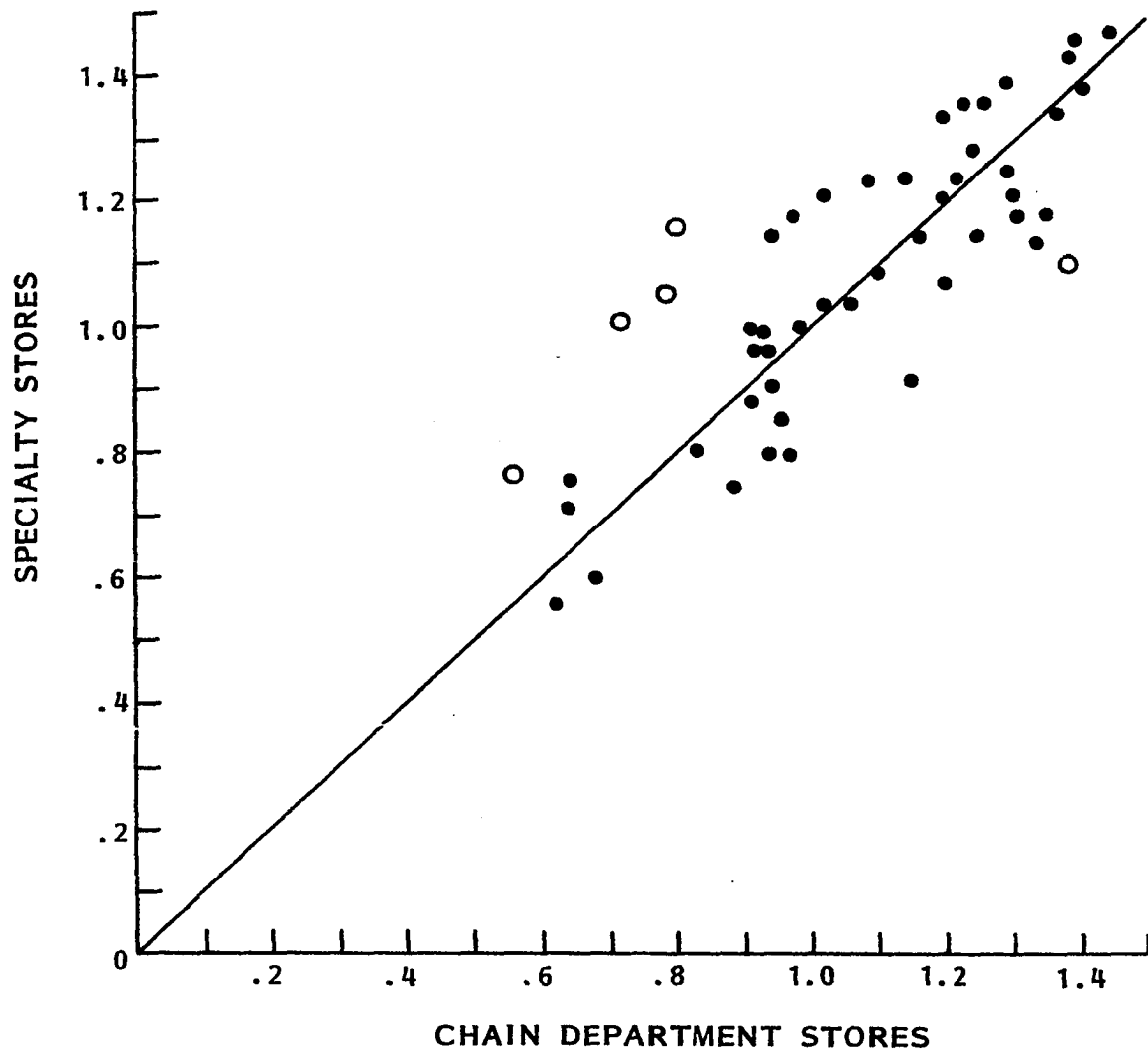


Figure 9. Variability in response on midmanagement items between specialty and chain department stores

Table 30. Discrepancy on midmanagement items between specialty and chain department stores

Item No.	Item	Ratings	
		Specialty	Chain Department
1	Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.	1.06	.78
13	Plan and coordinate fashion shows and special events.	.77	.56
15	Develop a seasonal merchandise budget based on past and anticipated sales.	1.11	1.38
28	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	1.01	.72
29	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	1.17	.80

types of stores would thus be similar.

Several items appeared to be discrepant from the pattern of response (Table 30). The content of these items included promotion, development of a seasonal merchandise budget, and skills in working with customers.

Chain department store respondents placed more importance on developing a seasonal merchandise budget. One possible

explanation would be that midmanagers in chain specialty stores do not have as much control over their merchandise budgets; decisions may be made at regional or national headquarters. This reasoning would not hold true for individually owned specialty stores. Chain department stores did indicate that the competency for developing a budget was more important, thus midmanagers may have more responsibilities in this area.

There were four items which fell to the left of the pattern of response, indicating that specialty store respondents placed more importance on them. Two of the items involved knowledge that would be important in dealing with customers: advising on flattering garment styles (Item 28) and identifying fabric performance characteristics (Item 29). Midmanagers in specialty stores may have more contact with customers. The competencies pertaining to window/interior displays (Item 1) and coordinating fashion shows (Item 13) were also more important to specialty store respondents. Midmanagers within specialty stores may coordinate these promotional activities, because there are no specialized persons to perform them.

Variability in response on midmanagement items between independent and chain department stores

In general, chain department store respondents rated all items slightly higher than did respondents in independent department stores. A majority of the items fell to the right

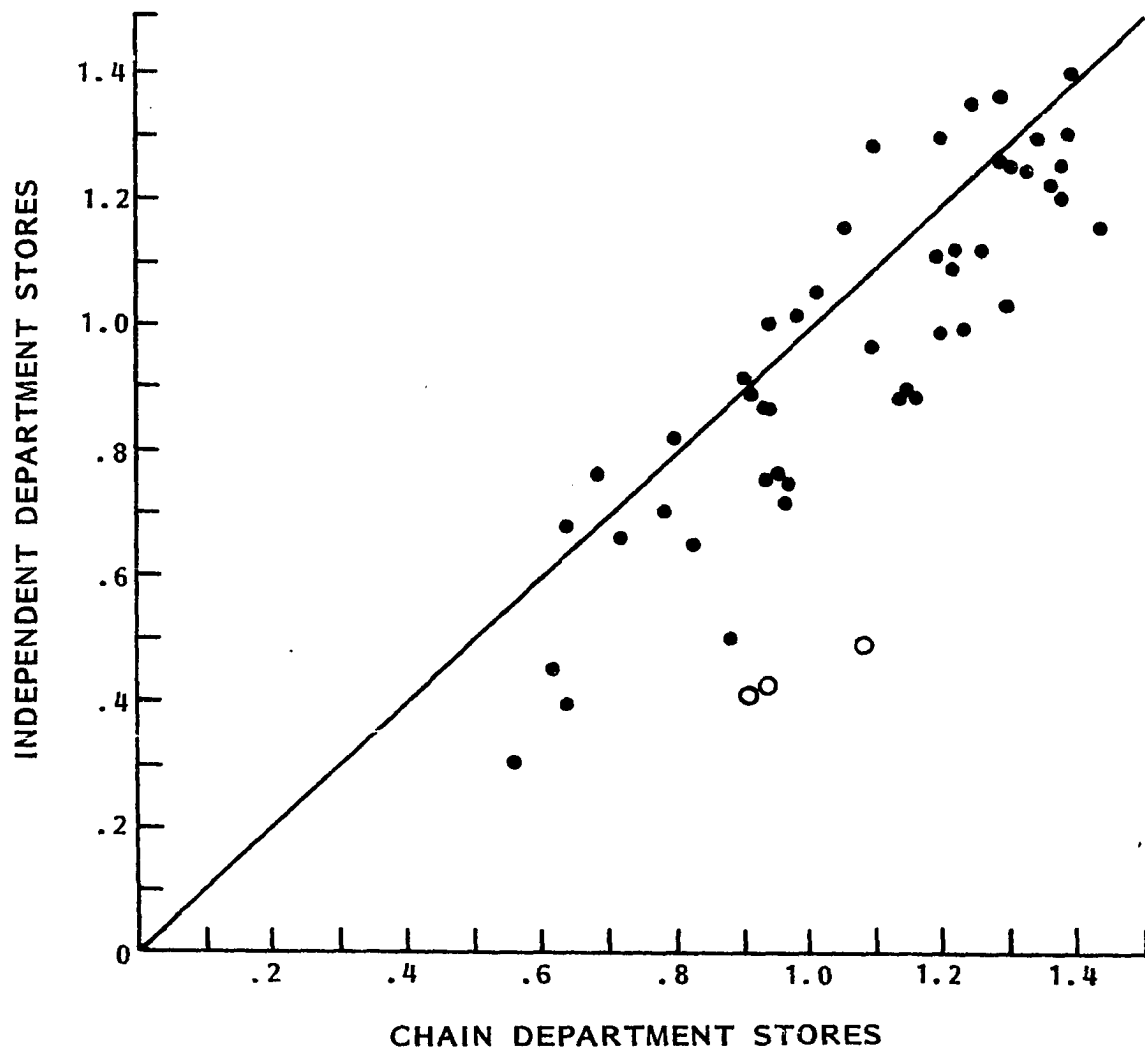


Figure 10. Variability in response on midmanagement items between independent and chain department stores

Table 31. Discrepancy on midmanagement items between independent and chain department stores

Item No.	Item	Ratings	
		Independent Department	Chain Department
3	Interpret legislation regarding wage and hours, workman's compensation and unemployment benefits as it affects store policy and procedure.	.43	.94
34	Develop training programs for new employees.	.48	1.08
40	Apply the elements and principles of design to the selection and promotion of merchandise.	.41	.91

of the line of equality (Figure 10). There were three items which appeared to be discrepant from the over-all trend of response (Table 31). These items fell to the right of the pattern of response indicating that respondents in chain department stores placed much greater importance on the competencies than did independent department stores. No logical explanation was found for the discrepancy on Items 3 and 40, other than the possibility that midmanagers need to be prepared for a wider variety of tasks in a chain versus an independent department store.

Midmanagers in chain department stores probably have more



responsibility for developing the training program (38). The ratings for independent and chain stores on Item 49, "carry out existing training programs for new employees," were .88 and 1.14 respectively. Thus, managers in both types of stores probably had responsibility for carrying out existing training programs but personnel in chain stores may have had more responsibility for developing new programs.

#### Similarities and differences among types of stores

Respondents in specialty and chain department stores had the most similar response pattern on the importance of competencies for both entry and midmanagement. Thus the competencies needed for the two types of operation would be similar. The greatest amount of disagreement was between respondents in specialty and independent department stores. Respondents in specialty stores rated a majority of the items higher for both entry and midmanagement.

Midmanagers in specialty stores appear to need a wider variety of skills and knowledge for their positions than do midmanagers in department stores. Midmanagers may be more specialized within their operations. Thus they would not rate the whole spectrum of competencies as important as would respondents from specialty stores. From personal observation the number of employees in a chain specialty store tends to be smaller, thus personnel get involved in a wide variety of

activities. Although independent and chain department stores were in greater agreement, the respondents in chain stores, in general, placed more importance on the competencies. This again is an indication that the types of activities vary and a chain store midmanager needs to be more of a generalist than a specialist.

Carmichael (1968) found that activities of midmanagers in traditional department, chain department, discount department, and variety stores differed. There was a major difference in activities performed in traditional department stores when compared to midmanagers in the other three types of stores. The midmanager in a traditional department store was more of a specialist with fewer activities to perform. Respondents in independent department stores viewed most activities as less crucial than the average of all respondents. Carmichael's findings were similar to findings of this study. In the present study respondents in independent department stores placed less importance on the whole spectrum of competencies than did specialty and chain department store respondents. If respondents in independent department stores do perform more specialized activities, they may place more importance on those special areas and less importance on other activities performed by others in the store. This response set could lower the overall mean for each item.

Findings from Carmichael's study (1968) indicated the

midmanager in a variety organization was more of a generalist performing a great number of activities. The variety store respondents rated most activities higher than the average of all respondents. This type of operation is similar to a specialty store; the store manager carries out a wide variety of activities. Specialty store respondents on the whole rated items more important, indicating that a greater number of competencies were needed for this type of operation than for others. In the present study, midmanagers in specialty stores appeared to be generalists as opposed to being specialists. Independent department store midmanagers appeared to be more specialized.

#### Categorization of Job Titles by Store Types

Business personnel were asked to categorize specific merchandising positions as entry level or midmanagement level (Table 32). The majority of respondents classified the positions of sales clerk, assistant department manager, and manager trainee as entry level positions. The positions of sales manager, department manager, buyer, assistant store manager, and store manager were classified by a majority of respondents as midmanagement. There was no consensus on the position of assistant buyer; 43.1% indicated it was entry level and 56.9% indicated midmanagement level. The level of responsibility and amount of authority may vary with this title.

Table 32. Categorization of job titles as entry or midmanagement

Job Title	Percentage	
	Entry	Midman.
Sales Clerk	100.0	0.0
Sales Manager	23.4	76.6
Manager Trainee	85.7	14.3
Assistant Department Manager	74.5	25.5
Department Manager	18.3	81.7
• Assistant Buyer	43.1	56.9
Buyer	0.0	100.0
Assistant Store Manager	10.2	89.8
Store Manager	0.0	100.0

The position of "store manager" presented difficulties in categorization. From personal observation the researcher notes that in a chain apparel specialty store, a store manager is usually considered to be midmanagement, but in a department store the position would be upper management. This choice, "upper management," was not presented to respondents. Thus, the categorization of store manager is questionable.

The store type (independent department, specialty, and

Table 33. Percentage of stores hiring two-year graduates

Job	Total
Sales Clerk	70.09
Sales Manager	11.32
Manager Trainee	53.27
Assistant Department Manager	25.23
Department Manager	14.95
Assistant Buyer	22.43
Buyer	7.48
Assistant Store Manager	14.95
Store Manager	6.54

chain department) was then compared with the designation of level for each position in contingency tables. The chi-square analysis used on these data revealed no significant differences among store types in the way positions were designated as entry or midmanagement. Thus there were no differences in the way stores categorized the positions.

#### Graduates Hired for Specific Positions by Store Type

Business personnel from stores provided information about hiring practices for two-year graduates (Table 33). For entry level positions, 70.09% of all stores had hired graduates as

sales clerks, 25.23% of the stores had hired graduates as assistant department managers, and 53.27% had hired graduates as manager trainees. The percentages were not high for midmanagement level positions, but this is to be expected because few graduates would probably be hired directly for midmanagement positions without a considerable amount of experience.

Findings from these hiring practices cannot be generalized to the entire population of department and specialty stores because the sample was not randomly selected. But the figures do indicate that two-year graduates have been hired into entry level positions that lead to the midmanagement career path.

A chi square analysis was run to determine if there were differences among store types in their hiring practices. There was a significant difference ( $p < .01$ ) for the position of assistant store manager (Table 34). Specialty stores were more likely to hire two-year graduates as assistant store managers than the two types of department stores. There was also a significant difference ( $p < .05$ ) for the assistant buyer position. Chain department stores differed in their hiring practices; all 18 respondents indicated that they had hired two-year graduates as assistant buyers.

Table 34. Chi-square analysis: Two-year graduates hired for specific positions by store type

Job Title	Store Type <sup>a</sup>						Chi-square
	1		2		3		
	yes	no	yes	no	yes	no	
Sales Clerk	31	13	30	15	14	4	.762
Sales Manager	8	36	4	40	0	18	4.579
Manager Trainee	27	17	18	27	12	6	5.639
Asst. Depart. Man.	11	33	11	34	5	13	.078
Depart. Manager	7	37	7	38	2	16	.253
Asst. Buyer	13	31	11	34	0	18	6.59*
Buyer	5	39	2	43	1	17	1.655
Asst. Store Manager	3	41	13	32	0	18	12.326**
Store Manager	3	41	4	41	0	18	1.671

<sup>a</sup>Store types indicated as follows: 1) independent department store, 2) specialty store, and 3) chain department store.

\*  
p < .05.

\*\*  
p < .01.

### Summary of Findings and Discussion

The competencies needed for entry and midmanagement level positions were different. Expectations of performance in terms of number and difficulty of competencies greatly increase for the midmanagement level. The competencies primarily needed by entry level personnel involve those in advising and selling to customers. A majority of the remaining items judged important were supportive to this function of working with customers. All competencies were important for midmanagement personnel. Midmanagers are expected to be decision-makers in the areas of assortment planning, personnel, merchandise budget planning, and promotional coordination.

One of the purposes of this study was to determine which competencies are important at the two levels. This was determined, but the questions related to how and where these competencies are to be obtained were not specifically answered. Since entry level personnel are expected to possess only certain competencies, it could be assumed that many of the competencies necessary for midmanagement level positions are obtained on the job. This, however, does not rule out the inclusion of the midmanagement level competencies in curriculum planning. Especially in the area of theoretical and technical aspects of textiles and clothing, it would be difficult to obtain these types of knowledge on the job. An



alternative explanation would be that entry level personnel are expected to possess the midmanagement competencies to a certain degree and to develop and improve the competencies as they progress on the career ladder to midmanagement. With either explanation the inclusion of all competencies in the curricular program would better prepare students for merchandising careers.

Educators and business personnel agreed on the importance of competencies to a considerable extent, with few exceptions. Educators did tend to rate competencies as more important, but this could be an artifact of their role. This finding pertaining to agreement between educators and business personnel is important in and of itself. With the current emphasis on accountability in public schools, agreement between educators and practitioners is vital to future support and funding of educational programs. These findings, however, cannot be generalized to the entire population of postsecondary educators and business personnel because the sample was not randomly selected. Educators and business personnel in this study may have had more contact and thus shared ideas on what is important.

Several more factors emerged in the factor analysis for midmanagement than for entry level. Also, more competencies were clustered in the factors for midmanagement than for entry level. Of the 51 items for midmanagement, 38 were

clustered within factors, compared to 24 for entry level. One of the purposes for factor analyzing the data was to organize the competencies on a conceptual basis to be used in curriculum planning. The nine factors for midmanagement level do provide a basis for organizing curriculum. Factors for entry level are not as useful because not all items included in the factors were considered important for entry level positions. All competencies were judged important for the midmanagement level, so the remaining items not included in factors need to be examined separately and included in the curriculum where conceptually compatible.

A limitation of this study was that the sample included only educators from postsecondary programs. Thus findings related to importance may not be as applicable to four-year programs.

Upon examination of the variance explained by the different factors for midmanagement, the researcher notes the relatively large amount removed by Factor 2, budgeting and profitable pricing (11.54%). This systematic amount of variation indicates that the area of competency is important. Businesses in most cases must show a profit to continue operations. Two other areas explained a great amount of variance: 1) theories and technical aspects of textiles and clothing (9.22%), and 2) working relations with customers (8.36%).

When demographic variables associated with respondents were related to factor scores for entry level, very few relationships were found. Females in retail outlets did place more emphasis on the selling and advising roles with customers than did males. As business personnel attained higher levels of education they appeared to place less importance on dealing with customers.

The relationships between demographic variables and the midmanagement factors were not strong ( $p < .05$ ). As business personnel achieved higher levels of education they placed more importance on working relations with customers and the management of merchandise assortment plans. Females in business placed more importance on the knowledge of external influences on business operations. For educators the geographical region was negatively correlated with budgeting and profitable pricing and management of merchandise assortment plans. With increasing age educators placed more importance on the management of merchandise assortment plans.

Personnel in independent department, specialty, and chain department stores placed differing amounts of importance on the competencies. The greatest difference in response was noted between respondents in independent department and specialty stores; specialty stores rated most items more important. One explanation for these findings is that specialty store personnel place more importance on these

competencies because they perform more functions within a retail outlet. Department store personnel may be more specialized due to departmentalization within stores. Personnel in specialty and chain department stores were in fairly high agreement on the importance of competencies, indicating that responsibilities would be similar. In order for graduates to have career flexibility, they should be prepared for careers in many types of retail outlets. The three selected for this study are not the only alternatives; there are also discount department stores, catalog operations, and many other types of specialty store operations in addition to apparel. The findings suggest that personnel should be able to function as specialists and generalists depending on the type of operation. Thus, curriculum planners should consider this scope of responsibility when planning programs.

There was a discrepancy between respondents in independent department and specialty stores in the area of personnel management for midmanagement positions. Respondents in specialty stores placed more importance on the ability to develop new training programs and the knowledge pertaining to employment legislation. Thus midmanagers in specialty and chain department stores may have more personnel responsibilities. This conclusion provides implications for curriculum planning.

Business respondents classified the positions of sales clerk, assistant department manager, and manager trainee as entry level. The positions of sales manager, department manager, buyer, assistant store manager, and store manager were classified as midmanagement. There was no consensus on the position of assistant buyer. There was no significant difference among respondents in the three store types in the way positions were categorized.

All stores had hired graduates for the entry level positions. The percentages for stores hiring graduates for midmanagement level positions were not as high. There were two differences in hiring practices among the store types. Specialty stores were more likely to hire two-year graduates as assistant store managers. Chain department stores were more likely to hire two-year graduates for the assistant buyer position.

## SUMMARY AND RECOMMENDATIONS

## Summary

Educational institutions have increasingly been required in the last two decades to provide evidence that they are accountable in terms of financial management and educational goals. This demand by the public has greatly affected the curriculum development process. In occupational programs, business and industry expect graduates to possess certain knowledge and skills for entry level positions and graduates expect to be well-prepared when they enter the job market. Thus, the curriculum development process for occupational education has become a very complex one involving input from many groups: educators, students, practitioners, and other community representatives.

The development of competency-based education was spurred on in part by this demand for accountability and the subsequent federal funding for educational research and development. Using competencies, which are based on life roles or occupational roles, to develop the curricular content is one method to enhance the accountability of a program. To insure that the competencies are relevant to the world of work, sources within and outside the educational institution should be tapped, this includes educators and practitioners in the field.

The main purpose of this study was to determine which competencies were perceived as important for entry and mid-management positions in fashion merchandising. Other objectives of this study were to contrast the competencies perceived as important between business personnel and post-secondary educators; between business personnel in independent department, specialty, and chain department stores; between respondents of different ages, sex, and geographical locations; and between educators and business personnel with varying amounts of work experience, teaching experience, and different levels of education.

The sample consisted of fashion merchandising educators in postsecondary programs throughout the United States and business personnel in independent department, specialty, and chain department stores. The number in the invited sample was 317 and the data producing sample numbered 221, which represented a 70% response rate. The instrument included 51 competency statements. Respondents rated each item for entry and midmanagement using a 1-11 certainty response scale.

Analysis of data included: 1) examination of transformed mean scores to determine important entry and midmanagement items, 2) examination of variability in response, using scattergrams, between educators and business personnel on entry and midmanagement level competencies and between business respondents in the three types of stores, 3) factor

analysis on entry and midmanagement level items; 4) a correlation between certain demographic variables and factors for entry and midmanagement, 5) a comparison of designation of positions as entry and midmanagement by store type using a chi square analysis, and 6) a comparison of the number of graduates hired for specific positions by store type, using chi square analysis.

Competencies needed for entry and midmanagement level were different. All 51 competencies were perceived to be important for midmanagement level positions and 16 were perceived as important for entry level. Educators and business personnel agreed on the importance of competencies to a considerable extent, but educators did tend to rate the majority of competencies as more important. This response set may be an artifact of the role or situation and there may be no real difference in the perception of importance of competencies.

Factors derived for entry level competencies included: 1) merchandise planning and control, 2) working relations with customers, 3) personnel management, and 4) theories and technical aspects of textiles and clothing. Midmanagement factors included: 1) working relations with customers, 2) budgeting and profitable pricing, 3) personnel management, 4) theories and technical aspects of textiles and clothing, 5) external influences on store planning and operation, 6) development and control of merchandise assortment plans,



7) determination of merchandise desired by customers, 8) development and adjustment of store plans, and 9) understanding of the fashion and retail industry.

When demographic variables associated with respondents were correlated with factor scores, very few relationships were found. Only one relationship was highly significant; on the entry level factor analysis females in retail outlets placed more emphasis on the selling and advising roles with customers than did males.

Personnel in independent department, specialty, and chain department stores placed differing amounts of importance on the competencies. Respondents in specialty stores tended to rate all items more important than did respondents in independent department stores. Personnel in chain department and specialty stores were in fairly high agreement on the importance of competencies.

Hiring practices related to two-year merchandising graduates were similar in the three types of stores. All types of stores hired two-year graduates for entry level positions. The only significant difference in hiring practices among the stores was that specialty stores were more likely to hire graduates as assistant store managers. The three types of stores were in agreement on their designations of merchandising positions as entry or midmanagement.

### Recommendations

This section is divided into three parts: 1) revision of the instrument; 2) recommendations for further research; and 3) recommendations for curriculum development.

#### Revision of the instrument

If this instrument were to be administered again, certain revisions are recommended. Some items contained more than one idea which may have contributed to heavy loading on different factors. These items may be better if divided into separate items. Phrases within these items that are underlined should be separated. Items were:

1. Plan attractive window and interior displays
26. Recognize the effects of community events and local business activities on store plans.
30. Perceive the importance of planning activities such as merchandise assortment planning and financial planning.
40. Apply the elements and principles of design to the selection and promotion of merchandise.
46. Coordinate all promotion including displays, advertising, and personal selling efforts.

Some items may need to be reworded because it was difficult to determine why tasks were being performed. Item 7, select specific merchandise which will satisfy the needs and wants of potential customers, loaded on two factors for entry level: merchandise planning and control and working relations with customers. This competency would be important

in planning and in assisting customers. Perhaps changing the verb in the item would clarify the role: assist customers in selecting merchandise that will satisfy their expressed needs. Another item that might need clarification is Item 4: identify needs and wants of potential customers.

Only nine items failed to cluster in at least one of the factor analyses (Items 1, 12, 13, 20, 25, 36, 39, 40, and 50). Some of these items did have more than one idea and loaded on more than one factor. In other cases more items may need to be written to better explain the competency area. For instance, Item 25 (comprehend the difference between using a periodic and perpetual system for a retail method of inventory) pertains to inventory control; items pertaining to automated and manual systems of control might be added to further expand the competency area.

In the questionnaire for the business sample respondents classified merchandising positions as entry or midmanagement. The researcher suggests adding the category of "upper management" because of variations in responsibility among the store types. From personal observation the researcher notes that a store manager in a chain specialty store is midmanagement and in an independent or chain department store is upper management. Due to the categories presented in the questionnaire the designation of "store manager" as middle management is questionable.

Recommendations for further study

Specialty stores within this study were not further divided into types of ownership: individually owned and chain. From personal experience the researcher has observed varying amounts of responsibility assumed by store managers in the areas of merchandise planning and budgeting. Because these stores were not separated, some ambiguity on items pertaining to merchandise assortment and budget planning may have resulted. However, this was not readily identifiable in the findings, except on one item (15). Developing a seasonal merchandise budget may or may not be handled by the store manager depending on type of ownership. There was a discrepancy on this item between specialty and chain department stores and it was difficult to explain. If this study were to be repeated differences in response between managers in chain and independently owned specialty stores should be identified and examined.

This instrument could be administered again but to a randomly selected sample within a geographically restricted area. However, problems with low return rates may be encountered with randomly selected business samples (Baker, 1975; Flaxman, 1973). Also the extent and nature of bias in the sample is not known.

A subsequent study might include fashion merchandising educators in four-year institutions. Differences might

exist between the two types of educators; differences not previously identified in this study might also exist between four-year educators and business personnel.

An investigation of where competencies could best be obtained by students would provide additional guidelines for curriculum development. A technique similar to the one LaSalle (1973) used would be applicable for this purpose. Business personnel could be asked to designate in-school activities, field experience, or on-the-job experience as the ideal setting for attaining the competencies.

Findings from this study pertaining to important competencies could be used to develop competency examinations for the various areas of expertise. Objectives could be developed for each competency statement and then items written for each objective.

#### Recommendations for curriculum development

On the basis of findings concerning the important competencies, the following recommendations are offered:

1. Expand field experience opportunities for students.

Many of the competencies designated as important at the entry level could be attained or developed through a field experience.

2. Include courses related to personnel management in the merchandising curriculum. Respondents in chain department and specialty stores indicated that this area of

expertise was important.

3. Integrate a core of business courses with the textiles and clothing courses. Managerial skills in merchandise and financial planning were rated very important for midmanagement personnel. The concepts of budgeting and maintaining profitability pervaded Factor 2 for the midmanagement level; this factor explained a high proportion of variance in the analysis. Thus, it seems to be an important area of expertise.
4. In the postsecondary curriculum, place primary emphasis on the competencies judged important for entry level personnel. It is suggested, although not supported by findings in this study, that all competencies judged important for midmanagement also be included in the curriculum. The researcher believes that these competencies could be developed to a certain degree through educational experiences and then further developed on the job.

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APPENDIX A:  
LETTER TO HOME ECONOMICS SUPERVISORS  
REQUESTING NAMES OF PROGRAMS

Department of  
Home Economics Education  
219 MacKay Hall  
Ames, Iowa 50011

Telephone 515-294-6444

# IOWA STATE UNIVERSITY

August 16, 1977

The Home Economics Education Department at Iowa State University is working on a project funded by the Department of Health, Education, and Welfare entitled Development of Standards for Textiles and Clothing Postsecondary Programs. The primary objectives of the project are:

1. to identify existing textiles and clothing career training programs at postsecondary schools;
2. to identify course content, learning experiences, and resources included in these programs;
3. to identify competencies needed for specific tasks in priority entry-level textiles and clothing careers;
4. to develop performance standards based on competencies and program standards based on information from occupational programs.

In order to get started, it is necessary that we identify postsecondary institutions offering programs in textiles and clothing occupations. If your school has programs of this nature, please fill out the enclosed half-sheet and return it as soon as possible.

We appreciate your cooperation.

Sincerely yours,

Irene Beavers  
Professor  
Home Economics Education

Maria McMartin  
Graduate Assistant  
Home Economics Education

APPENDIX B:  
QUESTIONNAIRE PERTAINING TO GENERAL INFORMATION  
ABOUT FASHION MERCHANDISING PROGRAMS

IOWA STATE UNIVERSITY  
HOME ECONOMICS EDUCATION DEPARTMENT

**DIRECTIONS:** This questionnaire is designed to obtain information on the current status of your textiles and clothing occupational program. Please answer each question as specifically as possible, noting that we are differentiating between program and course:

A PROGRAM consists of many courses, as well as on-the-job training, to train a student for entry-level employment within a career cluster.  
(Fashion Merchandising, Drapery-making, Industrial Apparel Production)

A COURSE is one unit of a program, emphasizing specific knowledges, attitudes, and skills. (Textiles, Costume Selection, Flat Pattern)

Many questions can be answered by placing an X in the appropriate blank; others require more detailed answers and a space is provided for you to supply the necessary information about your program. If you have additional comments place them adjacent to the questionnaire item. IF YOU HAVE ANY OF THIS INFORMATION IN PRINTED FORM, JUST INCLUDE A COPY WHEN YOU RETURN THE QUESTIONNAIRE.

1. List the title of the textiles and clothing postsecondary occupational training program(s) offered by your institution. Classify the program(s) into one of the following general categories:

- A. Merchandising
- B. Construction and design
- C. Maintenance and cleaning
- D. Textile production
- E. Other

Record the number of months required, the type of degree or diploma, the number of students enrolled in the program(s), and list the career opportunities for which the graduating student is qualified.

Program(s)	Category (A,B,C,D,E)	Number of months	Degree or diploma	Number of students	Career options







3. Select three of the most important textiles and clothing courses listed in item 2 and specify in Part A the textbooks required for students. In Part B describe the types of learning activities required both within and outside the classroom for these courses. List the specific activities as indicated and the number of hours, days, or weeks required for each activity.

COURSE TITLE 1: \_\_\_\_\_

A. TEXTBOOKS REQUIRED:	
B. LEARNING ACTIVITIES	HOURS/DAYS/ WEEKS
1. Field trips (specify place and type)	
2. Major projects	
3. Laboratory and/or simulated experiences	

COURSE TITLE 2: \_\_\_\_\_

A. TEXTBOOKS REQUIRED:	
B. LEARNING ACTIVITIES	HOURS/DAYS/ WEEKS
1. Field trips (specify place and type)	
2. Major projects	
3. Laboratory and/or simulated experiences	

COURSE TITLE 3: \_\_\_\_\_

A. TEXTBOOKS REQUIRED:	
B. LEARNING ACTIVITIES	HOURS/DAYS/ WEEKS
1. Field trips (specify place and type)	
2. Major projects	
3. Laboratory and/or simulated experiences	

4. This question is designed to determine what types of equipment and facilities are needed for the program(s). In the following blank(s) indicate the name(s) of your program(s). Then circle the appropriate letter in the right column to indicate that these resources are available for use in the program. Several blank spaces have been provided for you to list specific equipment.

PROGRAM TITLE(S): 1. \_\_\_\_\_

2. \_\_\_\_\_

FACILITIES/RESOURCES	PROGRAM	
Domestic sewing machines	1	2
Industrial sewing machines	1	2
Blindstitch hemmer	1	2
Commercial pressing equipment (specify)	1	2
	1	2
Drycleaning equipment (specify)	1	2
	1	2
Commercial washer and dryer	1	2
Display mannequins	1	2
Fitting rooms for customers	1	2
Mock-store or boutique-display laboratory	1	2
Textile production machinery (specify)	1	2
	1	2
Textile testing equipment		
Microscopes	1	2
Fabric counter	1	2
Launder-ometer	1	2
Others	1	2
	1	2
Apparel production equipment (specify)	1	2
	1	2
Manual adding machines	1	2
Cash registers (manual)	1	2
Electronic cash register	1	2
Trade journals and newspapers	1	2

5. List any other types of resources or facilities which you presently do not have, but would consider beneficial for the program(s).

PROGRAM TITLE 1: \_\_\_\_\_

PROGRAM TITLE 2: \_\_\_\_\_

ADDITIONAL RESOURCES AND FACILITIES

ADDITIONAL RESOURCES AND FACILITIES

THE FOLLOWING QUESTIONS ARE RELATED TO PROGRAM STANDARDS OR GUIDELINES, SPECIFICALLY FACILITIES, RESOURCES, TEACHER QUALIFICATIONS, EVALUATION PROCEDURES AND STAFFING. CHECK THE APPROPRIATE ANSWER AND PROVIDE QUALIFYING INFORMATION IN THE BLANKS PROVIDED.

6. Are validated performance-based criteria (competencies), for entry and advancement on the job, used as a basis for developing program objectives?  
 \_\_\_\_\_ Yes (PLEASE ATTACH A LIST IF AVAILABLE)  
 \_\_\_\_\_ No
7. Is the program planned and evaluated in terms of local, state, and federal manpower data? (Please check those which apply.)  
 \_\_\_\_\_ Local manpower data  
 \_\_\_\_\_ State manpower data  
 \_\_\_\_\_ Federal manpower data  
 \_\_\_\_\_ Other data (specify) \_\_\_\_\_
8. Has the program undergone articulation with similar textiles and clothing educational programs?  
 \_\_\_\_\_ With secondary schools  
 \_\_\_\_\_ With four-year universities and colleges  
 \_\_\_\_\_ Has not undergone articulation
9. Do the textiles and clothing credits from your program transfer to four year institutions?  
 \_\_\_\_\_ Yes  
 \_\_\_\_\_ No

10. Does your department prepare a plan which incorporates goals, objectives, and activities? (If so, enclose a copy.)
- ☐ Annual plan
- ☐ Three-year plan
- ☐ Five-year plan
- ☐ None
11. Are follow-up surveys conducted by your school or department to determine the current occupational status of students? How often?
- ☐ Not conducted
- ☐ One year after graduation
- ☐ Two years after graduation
- ☐ Three to five years after graduation
12. Where are your graduating students placed? Number the following possibilities in descending order of frequency (1--most frequently placed, etc.).
- ☐ Department store
- ☐ Fabric store
- ☐ Discount merchandiser
- ☐ Cleaning and laundry establishment
- ☐ Self-employed
- ☐ Apparel specialty store
- ☐ Other specialty store (specify type) \_\_\_\_\_
- ☐ Manufacturing company (specify type) \_\_\_\_\_
- ☐ Other (specify) \_\_\_\_\_
13. Is an advisory committee, consisting of business and community members, utilized to assist in:
- ☐ Need determination
- ☐ Resource allocation
- ☐ Program promotion
- ☐ Program evaluation
- ☐ Not used
14. If so, how often do they meet?
- ☐ Once a year
- ☐ Twice a year
- ☐ Once a month
- ☐ On call
- ☐ Other (specify) \_\_\_\_\_

15. Is there a degree requirement for instructors in the program?  
\_\_\_\_ Yes (specify) \_\_\_\_\_  
\_\_\_\_ No
16. How many hours or years of occupational work experience are required of instructors in the textiles and clothing program?  
\_\_\_\_ Hours  
\_\_\_\_ Years  
\_\_\_\_ Not specified
17. How many hours or years of occupational work experience are required for the teacher-coordinator who supervises field experiences?  
\_\_\_\_ Hours  
\_\_\_\_ Years  
\_\_\_\_ Not specified
18. How many semester or quarter hours of educational course work (methods of teaching, evaluation, curriculum, etc.) are required of instructors?  
\_\_\_\_ Semester credits  
\_\_\_\_ Quarter credits  
\_\_\_\_ No specific educational requirements
19. What courses are required for instructors certified to teach in your program? \_\_\_\_\_
20. Are there minimum space requirements per student in the classroom designated by state standards? If so, indicate the square footage per student.  
\_\_\_\_ Yes (specify) \_\_\_\_\_  
\_\_\_\_ No  
In the laboratory?  
\_\_\_\_ Yes (specify) \_\_\_\_\_  
\_\_\_\_ No
21. In your program, how many square feet per student is allocated for the classroom? \_\_\_\_\_  
For the laboratory? \_\_\_\_\_
22. Do you feel the space allocated for your program is adequate?  
\_\_\_\_ Yes  
\_\_\_\_ No
23. If not, indicate desired allocation figure? \_\_\_\_\_

24. What provisions have been made in the physical setting of the classroom and laboratory area to accommodate students with physical handicaps or other educational needs? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
25. What adjustments in programming have been made to accommodate students with physical handicaps or other educational needs? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
26. How often are students visited by the teacher-coordinator during the cooperative work experience?  
\_\_\_\_ Once a week  
\_\_\_\_ Once a month  
\_\_\_\_ Twice a month  
\_\_\_\_ Other \_\_\_\_\_
27. Do students receive wages during the cooperative work experience?  
\_\_\_\_ Yes  
\_\_\_\_ No
28. How many students participating in a cooperative work experience are supervised by one full-time teacher-coordinator?  
\_\_\_\_ 12 or less  
\_\_\_\_ 13-18  
\_\_\_\_ 19-23  
\_\_\_\_ 24  
\_\_\_\_ Other \_\_\_\_\_
29. How many staff hours are designated, on the average, in a week for  
\_\_\_\_ Instruction  
\_\_\_\_ Student advising  
\_\_\_\_ Preparation  
\_\_\_\_ Supervision
30. What is the maximum limit to the number of students in lecture/discussion classes and in laboratory classes?  
\_\_\_\_ Lecture/discussion classes  
\_\_\_\_ Laboratory classes  
\_\_\_\_ There is no limit.



APPENDIX C:  
LETTER OF CONSENT MAILED  
TO MERCHANDISING EDUCATORS

IOWA STATE  
UNIVERSITY

Telephone 515-294-6444

Dear Fashion Merchandising Program Coordinator:

The Home Economics Education Department at Iowa State University is conducting a nationwide project entitled "Development of Standards for Textiles and Clothing Postsecondary Programs" under a grant from the Department of Health, Education and Welfare. The purposes of this project are: 1) to develop and validate student competencies necessary for Fashion Merchandising and other Textiles and Clothing occupations, and 2) to develop and validate program standards related to facilities, resources, planning and evaluation procedures, staffing and programming. The standards validated in the study will aid postsecondary educators in developing new programs and evaluating existing ones.

Fashion Merchandising programs are being included in this study regardless of whether they are in the home economics, distributive education, or business departments. Information on existing programs has been obtained through an initial questionnaire which you may have completed. This information was used to develop program standard statements which will be critiqued by postsecondary educators at a later date. At that time some program coordinators and state department of education personnel will be asked to respond to the standard statements.

One purpose of the study is to validate competencies needed for mid-management level positions in Fashion Merchandising. The opinions of both educators and employers are felt to be important when determining competencies needed for a particular occupation. A questionnaire pertaining to competencies needed by Fashion Merchandising graduates will be mailed this fall to program instructors and employers. The response format (rating scale) for these questionnaires will be relatively simple, requiring approximately thirty minutes for completion.

In return for your cooperation, a final report of the study will be provided which will include a list of competencies for Fashion Merchandising and other Textiles and Clothing areas that were deemed important by educators and business personnel; a list of program standards for these same career clusters will also be included. It is hoped that these materials will provide assistance to educators in curriculum development and evaluation.

On the enclosed yellow sheet PLEASE CHECK whether or not you will participate in the study. If there is a program coordinator and one or more instructors, please provide this additional information. Hopefully different persons can respond to the competency questionnaires and the program standards questionnaire and distribute the participation among staff members.

As previously mentioned, business personnel will be asked to participate in the study. Because it is difficult to obtain cooperation from business personnel unless they are especially interested, we welcome suggestions of employers who have been involved with your educational program. It is assumed that these persons have more interest in the educational institutions in the local area and will cooperate.

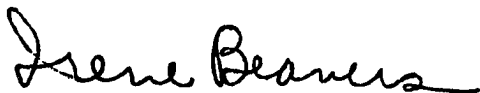
ON THE ENCLOSED YELLOW SHEET, please fill in the names of TWO employers who have either cooperated with your program or who have hired former graduates for merchandising positions. A business reply envelope has been provided for return mail.

Postsecondary educators and state department of education personnel have been very supportive of this project and have indicated a need for the competency and program standards materials. We hope that you will also acknowledge the importance of this project. YOUR COOPERATION WILL BE GREATLY APPRECIATED! If you have any questions about the project or your role as a participant, please feel free to contact:

Dr. Irene Beavers  
Project Director  
Home Economics Education  
Iowa State University  
Ames, IA 50011  
(Ph. 515-294-3991)

Kathleen Beery  
Research Assistant  
Home Economics Education  
Iowa State University  
Ames, IA 50011  
(Ph. 515-294-4757)

Sincerely yours,



Irene Beavers  
Professor  
Home Economics Education

IB:cn

-----  
 Please fill in the following information and return in the business reply envelope  
 -----

WE WILL PARTICIPATE IN THE STUDY. (circle one) YES NO

Program coordinator's name \_\_\_\_\_

Instructors' names \_\_\_\_\_

Department \_\_\_\_\_

School/city/state/zipcode \_\_\_\_\_

Telephone \_\_\_\_\_

MERCHANDISING PERSONNEL--those who have cooperated with the program or have hired  
 former graduates

1. Name \_\_\_\_\_

Name of business \_\_\_\_\_

Address \_\_\_\_\_

City/state/zipcode \_\_\_\_\_

Phone \_\_\_\_\_

Type of business---apparel specialty \_\_\_\_\_

---department store \_\_\_\_\_

---fabric store \_\_\_\_\_

---other (specify) \_\_\_\_\_

2. Name \_\_\_\_\_

Name of business \_\_\_\_\_

Address \_\_\_\_\_

City/state/zipcode \_\_\_\_\_

Phone \_\_\_\_\_

Type of business---apparel specialty \_\_\_\_\_

---department store \_\_\_\_\_

---fabric store \_\_\_\_\_

---other (specify) \_\_\_\_\_

APPENDIX D:  
PANEL OF EXPERTS

Panel of Experts  
to Review Competency Statements

Dr. Alyce Fanslow, Home Economics Education, Iowa State  
University

Dr. Geitel Winakor, Textiles and Clothing, Iowa State  
University

Mr. Mike Polan, Textiles and Clothing, Iowa State University

Mrs. Grace Kunz, Textiles and Clothing, Iowa State University

Ms. Linda Peterson, Fashion Merchandising, Des Moines Area  
Community College

Ms. Becky Owens, Fashion Merchandising, Penn Valley Community  
College

Mr. Dennis Nakamura, Personnel Manager, Younkers

Mr. Bob Mechem, Proprietor, Olive's

Ms. Vicky Long, Assistant Manager, County Seat

Mr. Michael Houghton, Personnel Manager, Macy's

Dr. Barbara McCuen, Industrial Administration, Iowa State  
University

Dr. John Coppett, Industrial Administration, Iowa State  
University

APPENDIX E:  
PRELIMINARY QUESTIONNAIRE FORM AND  
ACCOMPANYING MATERIALS

Department of  
Home Economics Education  
166 LeBaron Hall  
Ames, Iowa 50011

IOWA STATE  
UNIVERSITY

Telephone 515-294-6444

August 22, 1978

Dear

The enclosed material is a list of competencies for the mid-management level of fashion merchandising; directions and an explanation of the scheme used to develop the competencies are also included.

Please react to these statements in terms of completeness and clarity and make any suggestions or corrections you feel are necessary. I will be on vacation until August 29. If there are questions, leave a message at the Home Economics Education Department (294-3924) and I will respond upon my return.

Thank you for your assistance.

Sincerely,

*Kathleen Beery*  
Kathleen Beery



## COMPETENCIES FOR FASHION MERCHANDISING OCCUPATIONS

This questionnaire contains competency statements which may be essential at the mid-management level of fashion merchandising. Mid-management as defined for this study could include department managers, assistant department managers, buyers, assistant buyers, and sales managers. Competencies are knowledges, skills, or attitudes needed to accomplish specific tasks within an occupation.

You are asked to respond to each statement in terms of importance. Your response should indicate what you believe are necessary competencies. Responses to this questionnaire are to be made anonymously; you are asked to indicate selective demographic data to provide a summary of characteristics of respondents.

Please respond to each statement in the following manner:

If you believe the statement is VERY IMPORTANT, write 99 in the answer box.

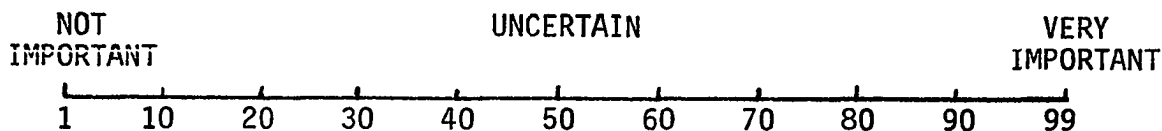
If you believe the statement is NOT IMPORTANT, write 1 in the answer box.

If you are UNCERTAIN of the importance of the statement, write 50 in the answer box.

A response from 1-49 indicates the degree to which you find the statement not important.

A response from 51-99 indicates the degree to which you find the statement important.

The following scale may help you keep these directions in mind.



## MERCHANDISING COMPETENCIES

1. Exhibit basic salesmanship techniques and procedures in the selling of fashion merchandise.
2. Demonstrate qualities of personality including skills and attributes that will be helpful when working with customers.
3. Apply basic mathematics to retail selling and pricing.
4. Perceive the importance of customer satisfaction in maintaining good public relations.
5. Coordinate advertising with display and personal salesmanship.
6. Plan and construct window and interior displays which exhibit merchandise that is timely, adequately stocked, and congruent with the store's image.
7. Select merchandise items for retail advertising based on profit and sales potential, inventory, customer appeal and the store's image.
8. Evaluate advertising copy in terms of accuracy of information, appropriate image, and attention-getting qualities and the store's advertising plan.
9. Evaluate the effectiveness of advertising and displays in terms of sales, costs, and consumer awareness.
10. Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.
11. Plan and coordinate fashion shows and special events.
12. Advise customers on becoming garment styles in terms of individual figure types and customer preferences.
13. Apply basic art principles in the selection and promotion of merchandise for a target market.
14. Evaluate the construction elements of apparel and accessory items.
15. Determine the current fashion trends and forecast future ones.
16. Interpret the effects of price, elasticity, and personal income on the consumer's purchasing behavior.
17. Comprehend the social, economic, political, religious, and historical factors which influence the evolution of fashion.
18. Explain the various theories of fashion adoption and the implications for product merchandising.
19. Utilize knowledge of the sociological-psychological aspects of textiles and clothing to better understand purchasing motives of the consumer.

20. Identify quality merchandise based on textile knowledge of fiber, fabric, yarn construction, and dyeing, printing, and finishing processes.
21. Identify fabric performance characteristics desirable for maximum consumer satisfaction in the use and maintenance of fashion merchandise.
22. Formulate criteria for determining best selection from available fashion merchandise.
23. Perceive the importance of familiarity with informational sources such as governmental agencies, research reports, trade associations, trade journals and newspapers, and consumer groups.
24. Locate and explain information related to legislation and regulations affecting the textiles industry and fashion merchandising businesses.
25. Assess merchandise in terms of quality and selection factors desired by customers.
26. Utilize terminology commonly accepted in the fashion and textile industry to communicate product information and ideas.
27. Explain the structure of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution.
28. Implement a cost method or retail method of inventory.
29. Explain the purposes and causes for markdowns on fashion merchandise.
30. Explain factors which influence profitable pricing of fashion merchandise.
31. Develop a seasonal merchandise plan based on past and anticipated sales and customer's wants.
32. Plan a merchandise assortment that is well balanced in relation to customer demand and which reflect economic, competitive, in-store, and fashion factors.
33. Perceive the importance of merchandise assortment planning and financial planning.
34. Describe a total retail operation according to functions or areas of responsibility: finance and control, merchandising, sales promotion, and operations.
35. Utilize periodic financial reports to appraise current plans and to make future plans involving purchases, adjustment of inventory level, changes in price levels, and control of stock shortages.
36. Demonstrate qualities of personality along with skills and attributes that will be helpful in developing and maintaining harmonious relationships with employees.
37. Evaluate oneself in terms of the qualities or characteristics necessary to become successful in fashion merchandising.

38. Develop or implement training plans for new employees related to store policies and procedures.
39. Describe the requirements, duties, working conditions and educational requirements for a mid-management level job in fashion merchandising.
40. Summarize the legislation affecting employer-employee relations: wages and hours, workman's compensation, and unemployment benefits.
41. Interpret legislation pertaining to customer liability and product liability.
42. Communicate effectively in written form: memos, forms, reports, and business letters.
43. Assign duties and delegate authority to maintain efficient operation of a store or department.
44. Identify the needs and wants of customers and interpret them in terms of specific merchandise.
45. Select merchandise based on a knowledge of the demographic factors that influence consumer demand.
46. Recognize the importance of knowledge of community events and business activities in order to plan appropriate merchandise stock and adequate sales personnel.
47. Develop and implement plans to prevent stock shrinkage.
48. Maintain merchandise assortment in proper balance between stocks and sales.
49. Explain the provisions of sales contracts which include terms of sales: datings and discounts.
50. Explain the types and functions of resident buying offices.

## CATEGORIES FOR FASHION MERCHANDISING COMPETENCY DEVELOPMENT

**BUSINESS AREA-** The scheme for developing these competencies came from the Health, Education, and Welfare Department guidelines for distributive education. It is as follows:

- Selling
- Sales promotion
- Buying
- Operations
- Market research
- Managerial
  - Planning
  - Directing
  - Coordinating

## TEXTILES AND CLOTHING

The textiles and clothing scheme utilized is as follows:

- Socio-psychological
- Textiles, textiles industry, fashion industry
- Historical
- Aesthetic
- Clothing consumption
- Quality evaluation as related to textiles and apparel construction

APPENDIX F:  
EDUCATORS' QUESTIONNAIRE

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IOWA STATE  
UNIVERSITY

Department of  
Home Economics Education  
166 LeBaron Hall  
Ames, Iowa 50011

Telephone 515-294-6444

Dear Fashion Merchandising Educator,

The Home Economics Education Department at Iowa State University is conducting a nation-wide study funded by the Department of Health, Education, and Welfare. The title of this project is "Development of Standards for Textiles and Clothing Postsecondary Programs."

One purpose of the study is to verify the competencies that are needed in entry-level and mid-management positions in fashion merchandising. Hopefully, the results of this study will provide assistance to community and junior colleges in planning, developing, and evaluating programs.

If you have already agreed to be a respondent, we thank you. If you have not received information about our study, we hope you will find time to participate.

YOUR input is very important. You can tell us, as an experienced educator, what you perceive as necessary competencies for graduates to attain employment in fashion merchandising.

Responses from educators and business personnel will be gathered on a nation-wide basis and the findings will be distributed to participants next spring. In this way, we hope to provide helpful insights into what educators and business personnel perceive as important fashion merchandising competencies.

Please complete this questionnaire and return it in the enclosed postage-paid envelope by                     . Time required to complete the form should be less than 45 minutes.

Thank you for your assistance and prompt attention.

Sincerely,

*Irene Beavers Kathleen Beery*

Irene Beavers                      Kathleen Beery  
Professor                          Graduate Assistant  
Department of Home Economics Education

## COMPETENCIES FOR OCCUPATIONS IN FASHION MERCHANDISING

INSTRUCTIONS

Competencies are the knowledges, skills, or attitudes needed to accomplish specific tasks within an occupation. In this survey, we are asking you to evaluate the relative importance of competencies for entry-level and mid-management level positions in fashion merchandising.

Following these instructions is a list of 51 statements which describe a variety of competencies.

Respond to each statement in two ways.

First, decide how important the competency is for a person to possess when this individual is in an entry-level position in fashion merchandising. Entry-level positions may, of course, vary from one store to another, but such positions could include assistant department managers and trainees in the store's management training program.

Second, respond to each statement by deciding how important the competency is for experienced persons employed in the mid-management level of fashion merchandising. Again, the term mid-management may be defined differently depending on the particular store, but persons holding such positions could include assistant buyers, buyers, and store managers.

Use numbers from 1 to 11 to describe the importance of the competencies stated in this questionnaire.

If you believe the statement is VERY IMPORTANT, write 11 in the answer box.

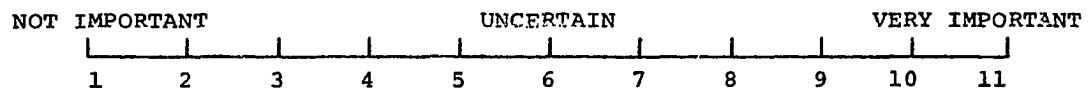
If you believe the statement is NOT IMPORTANT, write 1 in the answer box.

If you are UNCERTAIN of the importance of the statement, write 6 in the answer box.

A response from 1 to 5 indicates the degree to which you find the statement not important.

A response from 7 to 11 indicates the degree to which you find the statement important.

The following scale may help you keep these directions in mind.





For example, the response to a statement could be as follows:

<u>Statement</u>	<u>Response</u>	
	ENTRY	MID-MAN.
Personnel in fashion merchandising can interpret sales reports to supervisors in top management.	2	11

The response to this statement indicates that the participant felt the competency was important for the person in mid-management and that it was not very important for a person in an entry-level position.

YOUR responses should indicate what YOU believe are necessary competencies for persons in fashion merchandising. There are no right and wrong answers, so feel free to express your own opinions.

After you have responded to the list of competency statements, please answer the remaining questions which are designed to provide information about you and the other respondents in this survey.

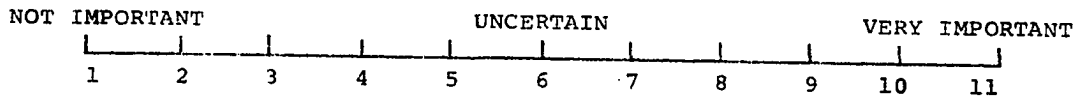
All responses to this questionnaire will remain confidential, but if you do want to receive a summary of this study, please include your name and address in the information you provide at the end of the questionnaire.

#### EVALUATION OF COMPETENCY STATEMENTS

Personnel in fashion merchandising can . . .

1. Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.
2. Evaluate advertising copy according to established principles of advertising.
3. Interpret legislation regarding wages and hours, workman's compensation, and unemployment benefits as it affects store policy and procedure.
4. Identify the needs and wants of potential customers.
5. Identify and analyze factors which influence the profitable pricing of merchandise.

	ENTRY	MID-MAN.
1.		
2.		
3.		
4.		
5.		

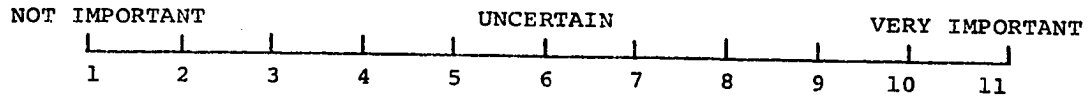


Personnel in fashion merchandising can . . .

		ENTRY	MID-MAN.
6. Use daily, weekly, or monthly stock and sales reports to evaluate past performance, appraise current plans, and make future plans.	6.		
7. Select specific merchandise which will satisfy the needs and wants of potential customers.	7.		
8. Adjust a merchandise assortment plan according to supply and demand.	8.		
9. Plan a balanced merchandise assortment.	9.		
10. Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	10.		
11. Identify quality merchandise based on a technical knowledge of fabrics and garment construction.	11.		
12. Evaluate themselves in terms of the personal qualities necessary to be successful in fashion merchandising.	12.		
13. Plan and coordinate fashion shows and special events.	13.		
14. Develop plans to prevent or reduce stock shrinkage.	14.		
15. Develop a seasonal merchandise budget based on past and anticipated sales.	15.		
16. Perform calculations needed to price merchandise.	16.		
17. Judge the relative cost and effectiveness of an advertisement or display.	17.		
18. Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	18.		

Personnel in fashion merchandising can . . .

		ENTRY	MID-MAN.
19.	Describe a total retail operation according to functions or areas of responsibility including finance and control, merchandising, sales promotion, and operations.	19.	
20.	Communicate advertising goals and plans to sales personnel.	20.	
21.	Interpret legislation pertaining to customer and product liability as it affects store policy and procedure.	21.	
22.	Explain the various theories of fashion adoption and their implications for merchandising.	22.	
23.	Work skillfully with customers.	23.	
24.	Select merchandise items for retail advertising based on profit and sales potential, available inventory, customer appeal, and the store's image.	24.	
25.	Comprehend the difference between using a periodic or perpetual system for a retail method of inventory.	25.	
26.	Recognize the effects of community events and local business activities on store plans.	26.	
27.	Interpret legislation regarding fabric and garment labeling as it affects store policy and procedure.	27.	
28.	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	28.	
29.	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	29.	
30.	Perceive the importance of planning activities such as merchandise assortment planning and financial planning.	30.	



Personnel in fashion merchandising can . . .		ENTRY      MID-MAN.	
31. Assign duties and delegate responsibility to maintain an efficient department or store operation.	31.		
32. Analyze the reasons for markdowns.	32.		
33. Explain the provisions of purchase orders which include terms of sale and delivery.	33.		
34. Develop training programs for new employees.	34.		
35. Explain the organization of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution.	35.		
36. Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.	36.		
37. Determine current fashion trends and forecast future ones.	37.		
38. Explain the types and functions of resident buying offices.	38.		
39. Develop and maintain harmonious relationships with other employees.	39.		
40. Apply the elements and principles of design to the selection and promotion of merchandise.	40.		
41. Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.	41.		
42. Effectively initiate and close sales.	42.		
43. Interpret the effects of price and personal income on the purchasing behavior of consumers.	43.		
44. Evaluate the quality of construction features and materials used in accessory items.	44.		

Personnel in fashion merchandising can . . .

ENTRY MID-  
MAN.

45. Communicate effectively in writing memos, forms, reports, and business letters.	45.		
46. Coordinate all promotion including displays, advertising, and personal selling efforts.	46.		
47. Use terminology commonly accepted in the fashion and textiles industry to communicate product information and ideas.	47.		
48. Perceive the importance of reading trade journals, newspapers, and other sources of trade information on a regular basis.	48.		
49. Carry out existing training programs for new employees.	49.		
50. Forecast store sales for a specified period of time.	50.		
51. Assign employees to tasks which are appropriate to the interests and skills of the individuals.	51.		

#### DEMOGRAPHIC DATA

Instructions: Please fill in the blank or check the appropriate box.

Title of your program: \_\_\_\_\_

Your position with the program: \_\_\_\_\_

The average number of students that graduate from your program each year: \_\_\_\_\_ Length of the program: \_\_\_\_\_

#### Your sex:

Male ☐

Female ☐

#### Your age:

30 or under ☐

31-40 ☐

41-50 ☐

51-60 ☐

61 or older ☐

#### Your educational preparation:

No degree ☐

A.S. or A.A. ☐

B.S. or B.A. ☐

M.S. or M.A. ☐

Ph.D. ☐

Other, please specify ☐

FME-7

Please continue to the next page.

Years of teaching experience:

Less than 1 year	<input type="checkbox"/>
1-2 years	<input type="checkbox"/>
3-4 years	<input type="checkbox"/>
5-6 years	<input type="checkbox"/>
7-8 years	<input type="checkbox"/>
9 or more years	<input type="checkbox"/>

Years of other work in fashion merchandising or related experiences:

None	<input type="checkbox"/>
Less than 1 year	<input type="checkbox"/>
1-2 years	<input type="checkbox"/>
3-4 years	<input type="checkbox"/>
5-6 years	<input type="checkbox"/>
7-8 years	<input type="checkbox"/>
9 or more years	<input type="checkbox"/>

Please put a check mark in the following box if you would like to receive a summary of the findings of this study.

☐

If you would like a summary of the research findings, please provide your name, address, and zip code below:

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---



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Providing this information is optional and your identity will still be protected.

After completing this questionnaire, please check that you have responded to every item. Thank you for your help.

APPENDIX G:  
LETTER OF TRANSMITTAL AND  
BUSINESS QUESTIONNAIRE

Department of  
Home Economics Education  
166 LeBaron Hall  
Ames, Iowa 50011

IOWA STATE  
UNIVERSITY

Telephone 515-294-6444

The Home Economics Education Department at Iowa State University is conducting a nationwide study entitled "Development of Standards for Textiles and Clothing Postsecondary Programs." One purpose of this study is to verify the competencies (skills, knowledge, and attitudes) that are needed in entry-level positions and at mid-management level positions in fashion merchandising. Hopefully, the results of this study will help two-year colleges plan, develop, and evaluate programs so they are more related to the needs of business.

Your name has been suggested to us as one who is knowledgeable of the competencies needed by persons employed in fashion merchandising. YOUR input is considered to be very important in this study because YOU can tell us--as an employer--what you expect of an employee in the fashion merchandising area. Your responses will provide information which will be distributed to postsecondary schools nationally.

Please complete the enclosed questionnaire and return it in the postage-paid envelope by Time required to complete the form should be approximately 30 minutes.

If the results of this study will help you in setting up guidelines for interviewing potential employees or in developing training plans for new employees, we will be glad to send you a summary of the findings. On the last page of the questionnaire, check the box to indicate that you would like to receive a copy of the results.

Thank you for your assistance and prompt attention. Names of business persons were solicited from the postsecondary educators at all of the participating schools. We asked for the names of persons who had shown interest in the local program or hired former graduates of the program.

Sincerely,

*Irene Beavers Kathleen Beery*

Irene Beavers	Kathleen Beery
Professor	Graduate Assistant
Department of Home Economics Education	



COMPETENCIES  
for occupations in  
FASHION MERCHANDISING

Questionnaire

Iowa State University  
Ames, Iowa 50011

## COMPETENCIES FOR OCCUPATIONS IN FASHION MERCHANDISING

INSTRUCTIONS

Competencies are the knowledges, skills, or attitudes needed to accomplish specific tasks within an occupation. In this survey, we are asking you to evaluate the relative importance of competencies for entry-level and mid-management level positions in fashion merchandising.

Following these instructions is a list of 51 statements which describe a variety of competencies.

Respond to each statement in two ways.

First, decide how important the competency is for a person to possess when this individual is in an entry-level position in fashion merchandising. Entry-level positions may, of course, vary from one store to another, but such positions could include assistant department managers and trainees in the store's management training program.

Second, respond to each statement by deciding how important the competency is for experienced persons employed in the mid-management level of fashion merchandising. Again, the term mid-management may be defined differently depending on the particular store, but persons holding such positions could include assistant buyers, buyers, and store managers.

Use numbers from 1 to 11 to describe the importance of the competencies stated in this questionnaire.

If you believe the statement is VERY IMPORTANT, write 11 in the answer box.

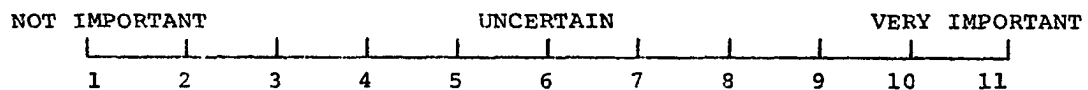
If you believe the statement is NOT IMPORTANT, write 1 in the answer box.

If you are UNCERTAIN of the importance of the statement, write 6 in the answer box.

A response from 1 to 5 indicates the degree to which you find the statement not important.

A response from 7 to 11 indicates the degree to which you find the statement important.

The following scale may help you keep these directions in mind.



For example, the response to a statement could be as follows:

<u>Statement</u>	<u>Response</u>	
	ENTRY	MID- MAN.
Personnel in fashion merchandising can interpret sales reports to supervisors in top management.	2	11

The response to this statement indicates that the participant felt the competency was important for the person in mid-management and that it was not very important for a person in an entry-level position.

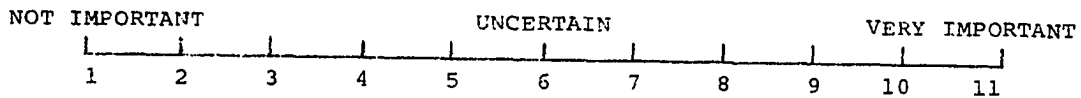
YOUR responses should indicate what YOU believe are necessary competencies for persons in fashion merchandising. There are no right and wrong answers, so feel free to express your own opinions.

After you have responded to the list of competency statements, please answer the remaining questions which are designed to provide information about you and the other respondents in this survey.

All responses to this questionnaire will remain confidential, but if you do want to receive a summary of this study, please include your name and address in the information you provide at the end of the questionnaire.

#### EVALUATION OF COMPETENCY STATEMENTS

		<u>Response</u>	
		ENTRY	MID- MAN.
Personnel in fashion merchandising can . . .			
1. Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.	1.		
2. Evaluate advertising copy according to established principles of advertising.	2.		
3. Interpret legislation regarding wages and hours, workman's compensation, and unemployment benefits as it affects store policy and procedure.	3.		
4. Identify the needs and wants of potential customers.	4.		
5. Identify and analyze factors which influence the profitable pricing of merchandise.	5.		



Personnel in fashion merchandising can . . .

		ENTRY	MID-MAN.
6. Use daily, weekly, or monthly stock and sales reports to evaluate past performance, appraise current plans, and make future plans.	6.		
7. Select specific merchandise which will satisfy the needs and wants of potential customers.	7.		
8. Adjust a merchandise assortment plan according to supply and demand.	8.		
9. Plan a balanced merchandise assortment.	9.		
10. Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	10.		
11. Identify quality merchandise based on a technical knowledge of fabrics and garment construction.	11.		
12. Evaluate themselves in terms of the personal qualities necessary to be successful in fashion merchandising.	12.		
13. Plan and coordinate fashion shows and special events.	13.		
14. Develop plans to prevent or reduce stock shrinkage.	14.		
15. Develop a seasonal merchandise budget based on past and anticipated sales.	15.		
16. Perform calculations needed to price merchandise.	16.		
17. Judge the relative cost and effectiveness of an advertisement or display.	17.		
18. Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	18.		

Personnel in fashion merchandising can . . .

		ENTRY	MID- MAN.
19.	Describe a total retail operation according to functions or areas of responsibility including finance and control, merchandising, sales promotion, and operations.	19.	
20.	Communicate advertising goals and plans to sales personnel.	20.	
21.	Interpret legislation pertaining to customer and product liability as it affects store policy and procedure.	21.	
22.	Explain the various theories of fashion adoption and their implications for merchandising.	22.	
23.	Work skillfully with customers.	23.	
24.	Select merchandise items for retail advertising based on profit and sales potential, available inventory, customer appeal, and the store's image.	24.	
25.	Comprehend the difference between using a periodic or perpetual system for a retail method of inventory.	25.	
26.	Recognize the effects of community events and local business activities on store plans.	26.	
27.	Interpret legislation regarding fabric and garment labeling as it affects store policy and procedure.	27.	
28.	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	28.	
29.	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	29.	
30.	Perceive the importance of planning activities such as merchandise assortment planning and financial planning.	30.	

ENTRY MID-  
MAN.

- |     |   |     |
|-----|---|-----|
| 31. | Assign duties and delegate responsibility to maintain an efficient department or store operation.   | 31. |
| 32. | Analyze the reasons for markdowns.  | 32. |
| 33. | Explain the provisions of purchase orders which include terms of sale and delivery.   | 33. |
| 34. | Develop training programs for new employees.  | 34. |
| 35. | Explain the organization of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution. | 35. |
| 36. | Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.                  | 36. |
| 37. | Determine current fashion trends and forecast future ones.  | 37. |
| 38. | Explain the types and functions of resident buying offices.   | 38. |
| 39. | Develop and maintain harmonious relationships with other employees.   | 39. |
| 40. | Apply the elements and principles of design to the selection and promotion of merchandise.  | 40. |
| 41. | Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.  | 41. |
| 42. | Effectively initiate and close sales.   | 42. |
| 43. | Interpret the effects of price and personal income on the purchasing behavior of consumers.   | 43. |
| 44. | Evaluate the quality of construction features and materials used in accessory items.  | 44. |

[illegible]

Personnel in fashion merchandising can . . .

ENTRY MID-  
MAN.

45. Communicate effectively in writing memos, forms, reports, and business letters.	45.		
46. Coordinate all promotion including displays, advertising, and personal selling efforts.	46.		
47. Use terminology commonly accepted in the fashion and textiles industry to communicate product information and ideas.	47.		
48. Perceive the importance of reading trade journals, newspapers, and other sources of trade information on a regular basis.	48.		
49. Carry out existing training programs for new employees.	49.		
50. Forecast store sales for a specified period of time.	50.		
51. Assign employees to tasks which are appropriate to the interests and skills of the individuals.	51.		

#### DEMOGRAPHIC DATA

Instructions: Please fill in the blank or check the appropriate box.

Your age: 30 or under ☐  
 31-40 ☐  
 41-50 ☐  
 51-60 ☐  
 61 or older ☐

Your sex: Male ☐  
 Female ☐

Years of experience in  
fashion merchandising:

Less than 1 year ☐  
 1-2 years ☐  
 3-4 years ☐  
 5-6 years ☐  
 7-8 years ☐  
 9 or more years ☐

Your educational preparation:

No degree ☐  
 A.S. or A.A. ☐  
 B.S. or B.A. ☐  
 M.S. or M.A. ☐  
 Other, please specify ☐

Title of your present position:

How many full-time employees work in your store?

25 or fewer ☐  
More than 25 ☐

Is your store clearly departmentalized for the purposes of accounting, inventory control, etc.?

Yes ☐ No ☐

Please classify each of the following job titles according to whether you consider the position to be an entry-level or mid-management job:

ENT. MID.

Sales clerk	<input type="checkbox"/>	<input type="checkbox"/>
Sales manager	<input type="checkbox"/>	<input type="checkbox"/>
Trainee, management training program	<input type="checkbox"/>	<input type="checkbox"/>
Assistant department manager	<input type="checkbox"/>	<input type="checkbox"/>
Department manager	<input type="checkbox"/>	<input type="checkbox"/>
Assistant buyer	<input type="checkbox"/>	<input type="checkbox"/>
Buyer	<input type="checkbox"/>	<input type="checkbox"/>
Assistant Store manager	<input type="checkbox"/>	<input type="checkbox"/>
Store manager	<input type="checkbox"/>	<input type="checkbox"/>

Which of the following best describes your store's product mix?

Women's apparel only ☐

Women's apparel and one or more other product lines such as children's apparel, men's apparel, or home furnishings and accessories. ☐

Within the past two years, has your business hired any graduates from 2-year educational programs for any positions?

Yes ☐ No ☐

For what positions were these graduates hired? (Check all appropriate boxes.)

Question does not apply	<input type="checkbox"/>
Sales clerk	<input type="checkbox"/>
Sales manager	<input type="checkbox"/>
Trainee, management training program	<input type="checkbox"/>
Assistant department manager	<input type="checkbox"/>
Department manager	<input type="checkbox"/>
Assistant buyer	<input type="checkbox"/>
Buyer	<input type="checkbox"/>
Assistant store manager	<input type="checkbox"/>
Store manager	<input type="checkbox"/>

Please put a check mark in the following box if you would like to receive a summary of the findings of this study. ☐

If you would like a summary of the research findings, please provide your name, address, and zip code below:

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Providing this information is optional; your identity is protected.

After completing this questionnaire, please check that you have responded to every item. Thank you for your help.

FMB-8



APPENDIX H:  
POSTCARDS USED FOR FOLLOWUPS

**P-526**



No postage  
necessary  
if mailed  
in the United States

**Business Reply Mail**

First Class Permit No. 675 Ames, Iowa

Postage will be paid by addressee

**iowa state  
university**

**ISU Mail Center  
Ames, Iowa 50011**



Have you mailed your questionnaire concerning competencies needed for persons employed in fashion merchandising? Your response is needed in order to accurately describe the types of skills and knowledge that are expected of persons employed in this area.

Because it important that your response is included in this study, please complete the attached return postal card indicating when your questionnaire can be expected.

*Irene Beavers*

Irene Beavers  
Project Director  
Home Economics Education  
Iowa State University  
515-294-1234

\_\_\_ I have already mailed the questionnaire.

\_\_\_ Today I am getting it in the mail.

\_\_\_ I will plan to fill out the questionnaire within the next two days and mail it to you.

\_\_\_ Something happened to my questionnaire. Please send another and I will fill it out.

Name \_\_\_\_\_

Bus. Name \_\_\_\_\_

City/State \_\_\_\_\_

\_\_\_ I have already mailed the questionnaire.

\_\_\_ Today I am getting it in the mail.

\_\_\_ I will plan to fill out the questionnaire within the next two days and mail it to you.

\_\_\_ Something happened to my questionnaire. Please send another and I will fill it out.

Name \_\_\_\_\_

School Name \_\_\_\_\_

City/State \_\_\_\_\_

Have you returned your questionnaire concerning competencies needed for persons employed in fashion merchandising? Your response is needed in order to accurately describe the types of skills and knowledge that are expected of persons in this area.

Because it is important that your response be included in this study, please complete your questionnaire and send by return mail. If something happened to your questionnaire, please let me know and another will be sent.

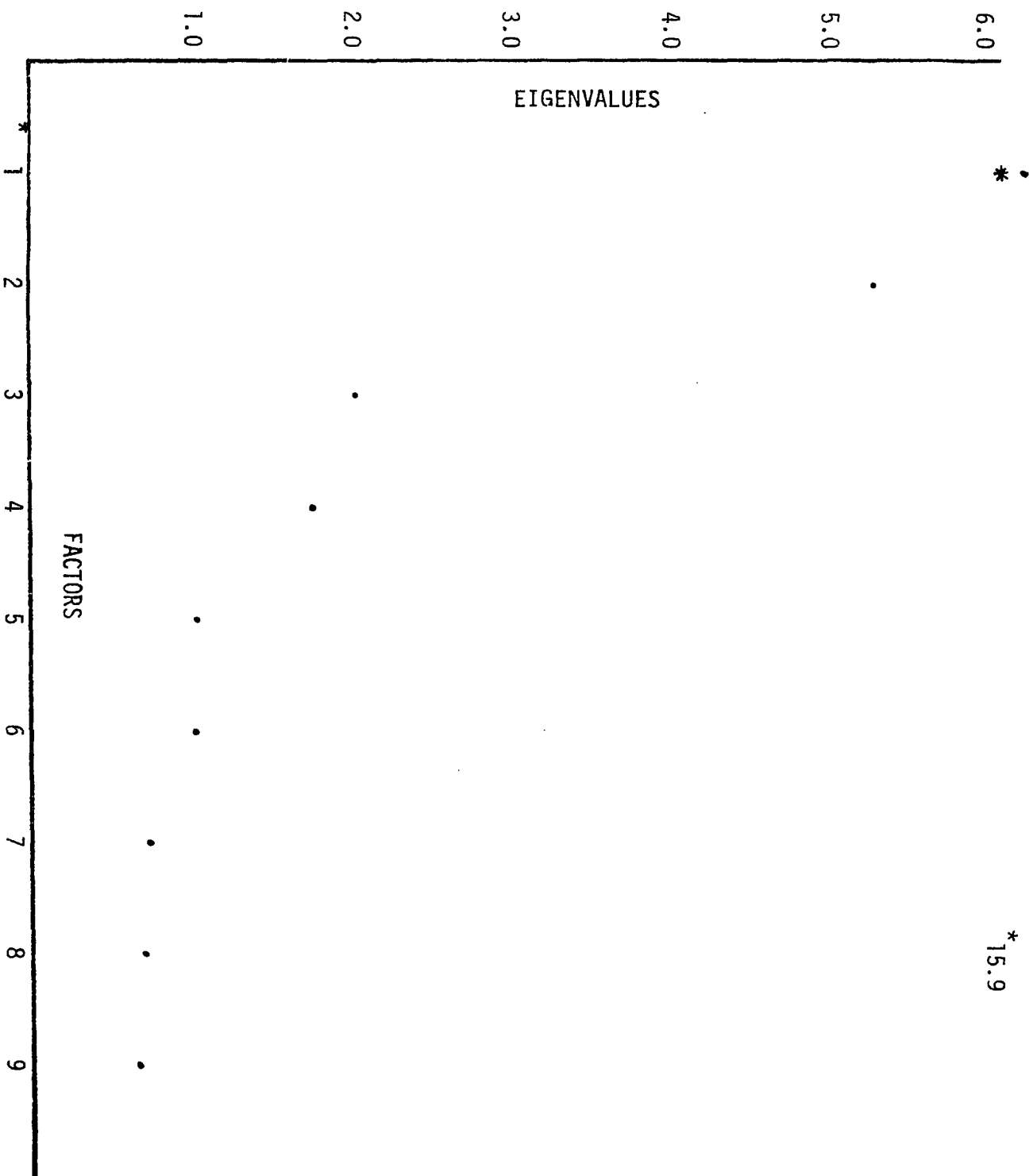
*Irene Beavers*

Irene Beavers  
Project Director  
Home Economics Education  
169 LeBaron Hall  
Iowa State University  
Ames, IA 50011  
515-294-1234 OR 515-294-4757

Dr. Irene Beavers  
169 LeBaron Hall  
Iowa State University  
Ames, Iowa 50011

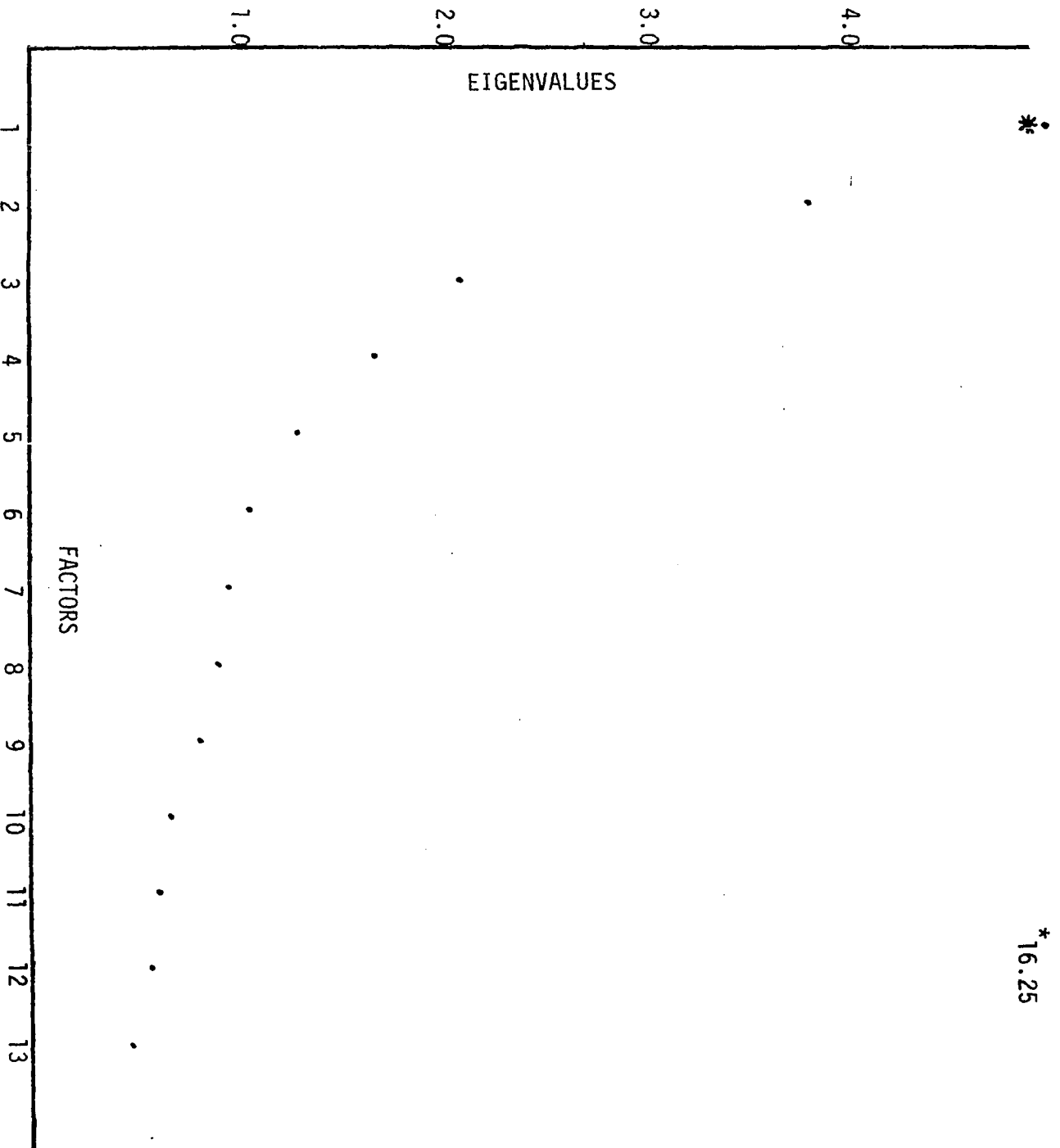
APPENDIX I:

SCREE PLOT FOR ENTRY LEVEL FACTOR ANALYSIS



APPENDIX J:

SCREE PLOT FOR MIDMANAGEMENT FACTOR ANALYSIS



\*16.25



## APPENDIX K:

## STATES DESIGNATED BY REGIONAL AREA

Regions of the Country

<u>Region &amp; State</u>	<u>Code</u>	<u>Region &amp; State</u>	<u>Code</u>
No. 1 Southwest		No. 5 Midwest	
California	5	Colorado	6
Arizona	3	Kansas	17
Nevada	29	Iowa	16
Utah	45	Nebraska	28
		North Dakota	35
No. 2 Northwest		South Dakota	42
Washington	48	Minnesota	24
Oregon	38	Missouri	26
Idaho	13	Wisconsin	50
Montana	27	Illinois	14
Wyoming	51	Indiana	15
		Michigan	23
No. 3 South Central		No. 5 Northeast	
New Mexico	32	Ohio	36
Texas	44	Pennsylvania	39
Oklahoma	37	New York	33
		New Jersey	31
No. 4 Southeast		Delaware	8
Arkansas	4	Connecticut	7
Louisiana	19	Massachusetts	22
Mississippi	25	Maine	20
Alabama	1	New Hampshire	30
Florida	10	Vermont	46
Georgia	11	District of Columbia	9
North Carolina	34	Maryland	21
South Carolina	41	Rhode Island	40
Tennessee	43		
Kentucky	18		
Virginia	47		
West Virginia	49		

APPENDIX L:  
ITEMS, MEANS, AND STANDARD DEVIATIONS FOR  
ENTRY LEVEL COMPETENCIES

Item No.	Item	Mean	Standard Deviation
1.*	Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.	.19	.92
2.	Evaluate advertising copy according to established principles of advertising.	.60	.75
3.	Interpret legislation regarding wages and hours, workman's compensation, and unemployment benefits as it affects store policy and procedure.	.80	.82
4.*	Identify the needs and wants of potential customers.	.78	.84
5.	Identify and analyze factors which influence the profitable pricing of merchandise.	.33	.78
6.	Use daily, weekly, or monthly stock and sales reports to evaluate past performance, appraise current plans, and make future plans.	-.25	.83
7.*	Select specific merchandise which will satisfy the needs and wants of potential customers.	.30	.96
8.	Adjust a merchandise assortment plan according to supply and demand.	-.37	.84
9.	Plan a balanced merchandise assortment.	-.35	.84
10.	Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	.05	.98
11.*	Identify quality merchandise based on a technical knowledge of fabrics and garment construction.	.37	.91
12.*	Evaluate themselves in terms of the personal qualities necessary to be successful in fashion merchandising.	.89	.84
13.	Plan and coordinate fashion shows and special events.	-.21	.87

---

\* Items selected as important for entry level.

Item No.	Item	Mean	Standard Deviation
14.	Develop plans to prevent or reduce stock shrinkage.	-.02	.89
15.	Develop a seasonal merchandise budget based on past and anticipated sales.	-.53	.76
16.	Perform calculations needed to price merchandise.	.12	1.04
17.	Judge the relative cost and effectiveness of an advertisement or display.	-.31	.82
18.	Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	-.08	.93
19.	Describe a total retail operation according to functions or areas of responsibility including finance and control, merchandising, sales promotion, and operations.	-.26	.90
20.	Communicate advertising goals and plans to sales personnel.	-.16	.95
21.	Interpret legislation pertaining to customer and product liability as it affects store policy and procedure.	-.30	.94
22.	Explain the various theories of fashion adoption and their implications for merchandising.	-.18	.92
23.*	Work skillfully with customers.	1.19	.68
24.	Select merchandise items for retail advertising based on profit and sales potential, available inventory, customer appeal, and the store's image.	-.18	.85
25.	Comprehend the difference between using a periodic or perpetual system for a retail method of inventory.	-.20	.90
26.	Recognize the effects of community events and local business activities on store plans.	.05	.86
27.	Interpret legislation regarding fabric and garment labeling as it affects store policy and procedure.	-.07	.94
28.*	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.94	.79

Item No.	Item	Mean	Standard Deviation
29.*	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	.80	.80
30.	Perceive the importance of planning activities such as merchandise assortment planning and financial planning.	-.10	.87
31.	Assign duties and delegate responsibility to maintain an efficient department or store operation.	.00	.99
32.	Analyze the reasons for markdowns.	.10	.79
33.	Explain the provisions of purchase orders which include terms of sale and delivery.	-.23	.94
34.	Develop training programs for new employees.	-.62	.93
35.	Explain the organization of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution.	-.32	.93
36.*	Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.	.36	.82
37.*	Determine current fashion trends and forecast future ones.	.20	.79
38.	Explain the types and functions of resident buying offices.	-.43	.92
39.*	Develop and maintain harmonious relationships with other employees.	1.16	.73
40.	Apply the elements and principles of design to the selection and promotion of merchandise.	.10	.94
41.	Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.	-.32	.82
42.*	Effectively initiate and close sales.	1.07	.79
43.	Interpret the effects of price and personal income on the purchasing behavior of consumers.	.06	.89
44.*	Evaluate the quality of construction features and materials used in accessory items.	.28	.93

Item No.	Item	Mean	Standard Deviation
45.*	Communicate effectively in writing memos, forms, reports, and business letters.	.55	.87
46.	Coordinate all promotion including displays, advertising, and personal selling efforts.	-.06	.87
47.*	Use terminology commonly accepted in the fashion and textiles industry to communicate product information and ideas.	.67	.87
48.*	Perceive the importance of reading trade journals, newspapers, and other sources of trade information on a regular basis.	.82	.82
49.	Carry out existing training programs for new employees.	-.25	1.01
50.	Forecast store sales for a specified period of time.	-.53	.82
51.	Assign employees to tasks which are appropriate to the interests and skills of the individuals.	-.03	1.04

APPENDIX M:  
ITEMS, MEANS, AND STANDARD DEVIATIONS FOR  
MIDMANAGEMENT COMPETENCIES

Item No.	Item	Mean	Standard Deviation
1.	Plan attractive window and interior displays which show merchandise that is timely and adequately stocked.	.88	.77
2.	Evaluate advertising copy according to established principles of advertising.	1.10	.60
3.	Interpret legislation regarding wages and hours, workman's compensation, and unemployment benefits as it affects store policy and procedure.	.94	.86
4.	Identify the needs and wants of potential customers.	1.44	.33
5.	Identify and analyze factors which influence the profitable pricing of merchandise.	1.35	.47
6.	Use daily, weekly, or monthly stock and sales reports to evaluate past performance, appraise current plans, and make future plans.	1.44	.32
7.	Select specific merchandise which will satisfy the needs and wants of potential customers.	1.41	.37
8.	Adjust a merchandise assortment plan according to supply and demand.	1.31	.50
9.	Plan a balanced merchandise assortment.	1.35	.50
10.	Use knowledge of the sociological-psychological aspects of textiles and clothing to better understand the purchasing motives of consumers.	.90	.76
11.	Identify quality merchandise based on a technical knowledge of fabrics and garment construction.	1.14	.64
12.	Evaluate themselves in terms of the personal qualities necessary to be successful in fashion merchandising.	1.20	.56
13.	Plan and coordinate fashion shows and special events.	.75	.78
14.	Develop plans to prevent or reduce stock shrinkage.	1.25	.49
15.	Develop a seasonal merchandise budget based on past and anticipated sales.	1.31	.53
16.	Perform calculations needed to price merchandise.	1.19	.71



Item No.	Item	Mean	Standard Deviation
17.	Judge the relative cost and effectiveness of an advertisement or display.	1.11	.64
18.	Comprehend the economic, political, and historical factors which influence the changing pattern of fashion.	.82	.85
19.	Describe a total retail operation according to functions or areas of responsibility including finance and control, merchandising, sales promotion, and operations.	1.04	.66
20.	Communicate advertising goals and plans to sales personnel.	1.18	.62
21.	Interpret legislation pertaining to customer and product liability as it affects store policy and procedure.	1.06	.68
22.	Explain the various theories of fashion adoption and their implications for merchandising.	.78	.84
23.	Work skillfully with customers.	1.23	.65
24.	Select merchandise items for retail advertising based on profit and sales potential, available inventory, customer appeal, and the store's image.	1.34	.49
25.	Comprehend the difference between using a periodic or perpetual system for a retail method of inventory.	1.09	.70
26.	Recognize the effects of community events and local business activities on store plans.	1.17	.57
27.	Interpret legislation regarding fabric and garment labeling as it affects store policy and procedure.	1.02	.73
28.	Advise customers on flattering garment styles based on a general knowledge of figure types and individual customer preferences.	.91	.84
29.	Identify fabric performance characteristics which consumers want in the use and care of merchandise.	1.09	.70
30.	Perceive the importance of planning activities such as merchandise assortment planning and financial planning.	1.29	.52

Item No.	Item	Mean	Standard Deviation
31.	Assign duties and delegate responsibility to maintain an efficient department or store operation.	1.42	.41
32.	Analyze the reasons for markdowns.	1.40	.36
33.	Explain the provisions of purchase orders which include terms of sale and delivery.	1.23	.60
34.	Develop training programs for new employees.	1.08	.78
35.	Explain the organization of the fashion industry in terms of the fashion market calendar, primary markets, secondary markets, and channels of distribution.	.98	.71
36.	Arrange floor space effectively for merchandise sales considering consumer buying behavior, customer convenience and safety, and security.	1.35	.46
37.	Determine current fashion trends and forecast future ones.	1.33	.44
38.	Explain the types and functions of resident buying offices.	.88	.80
39.	Develop and maintain harmonious relationships with other employees.	1.43	.35
40.	Apply the elements and principles of design to the selection and promotion of merchandise.	.96	.76
41.	Use monthly or annual financial reports to evaluate past performance, appraise current plans, and make future plans.	1.35	.41
42.	Effectively initiate and close sales.	1.06	.86
43.	Interpret the effects of price and personal income on the purchasing behavior of consumers.	1.02	.70
44.	Evaluate the quality of construction features and materials used in accessory items.	.97	.75
45.	Communicate effectively in writing memos, forms, reports, and business letters.	1.31	.44
46.	Coordinate all promotion including displays, advertising, and personal selling efforts.	1.26	.52
47.	Use terminology commonly accepted in the fashion and textiles industry to communicate product information and ideas.	1.22	.59

Item No.	Item	Mean	Standard Deviation
48.	Perceive the importance of reading trade journals, newspapers, and other sources of trade information on a regular basis.	1.28	.49
49.	Carry out existing training programs for new employees.	1.20	.64
50.	Forecast store sales for a specified period of time.	1.23	.55
51.	Assign employees to tasks which are appropriate to the interests and skills of the individuals.	1.32	.48